PDS eCMSpro
User Manual

4-8-2013 v1.2

A Note on Web Browser Software:

Your website is designed to display correctly for public visitors using Microsoft Internet Explorer, Mozilla Firefox, Google Chrome and other common web browsers.

For administrative editing functions, PDS eCMSpro requires the Mozilla Firefox browser to assure full use and functionality of the program. We cannot guarantee expected functionality when using Microsoft Internet Explorer. Firefox is consistently compliant with today's coding standards and should be the only browser used for administrative functions.

A Note on Versions:

The instructions and screenshots in this document reflect the current version of PDS eCMSpro at the time of writing. Previous versions of the software may differ on visuals and functionality. Please contact us with any questions.

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Logging In to Your Website

To begin making edits to your PDS eCMSpro website you must first sign in with your website editing account. Your website editing account username and password have been provided to you by PDS Staff or by the person in your organization that manages website editing accounts.

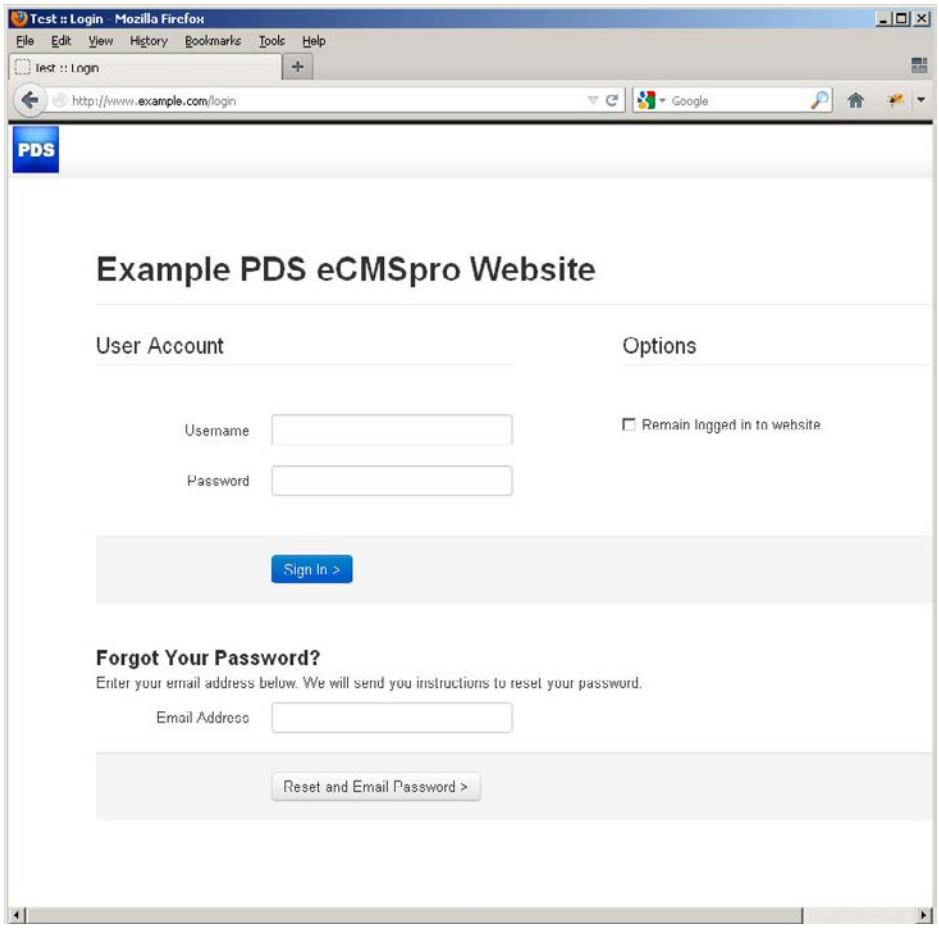
Follow the steps below to sign in with your website editing account username and password:

1. Visit the homepage of your website

2. Click inside the address bar of your web browser. Add the text **/login** to the end of your website homepage address, like the example below:

   http://www.example.com/login

3. Hit the **enter** key on your keyboard. Your web browser will load the login page for your website. The login page for your website will appear similar to the example below:



4. Enter your username and password and click the Sign In button. You will be directed back to the homepage of your site to begin making edits.

Continued...

If you do not have your website account username and password or if your password is not accepted:

If you cannot remember your password or are unsure if you have a website editing account, first try resetting your password using the “Forgot Your Password?” tool.

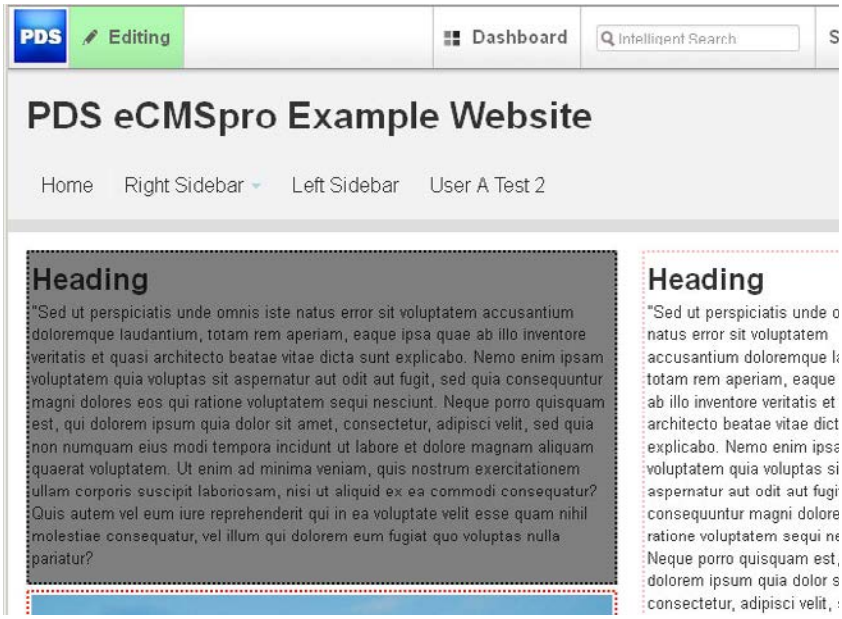
1. Enter your email address in the “Forgot Your Password?” section and click the “Reset and Email Password” button.
2. In a few minutes you should receive an email containing instructions to reset your password. Follow the instructions in the email to access your account.
3. If you do not receive the email, contact PDS or the person in your organization that is responsible for website editing accounts.

Editing Pages

After logging in you will see the **Editing Toolbar** across the top of your website. The editing toolbar includes the square, blue PDS logo on the left and the **Edit** button immediately to the right of the blue PDS logo.

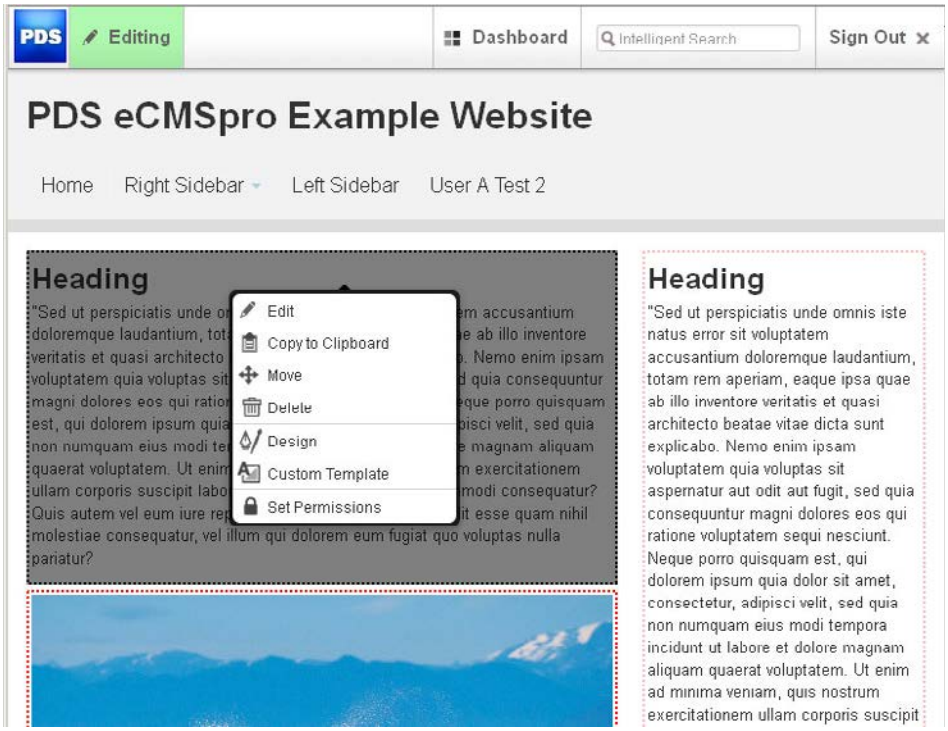
Follow the steps below to edit the content of a page that appears on your site:

1. Visit the page on your site that you wish to edit.
2. Click the **Edit** button that appears on the Editing Toolbar.
3. The page you are viewing will appear in **Editing Mode**. The text in the edit button changes from Edit to **Editing** to reflect this change.
4. Each section of content on the page that you can edit now appears surrounded by a red, dashed line. These sections are called **Blocks**. Roll your mouse over the block you wish to edit. When your mouse is positioned over the block you wish to edit the block will be highlighted gray.


PDS
Editing
Dashboard
Intelligent Search
PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
User A Test 2
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?
Heading

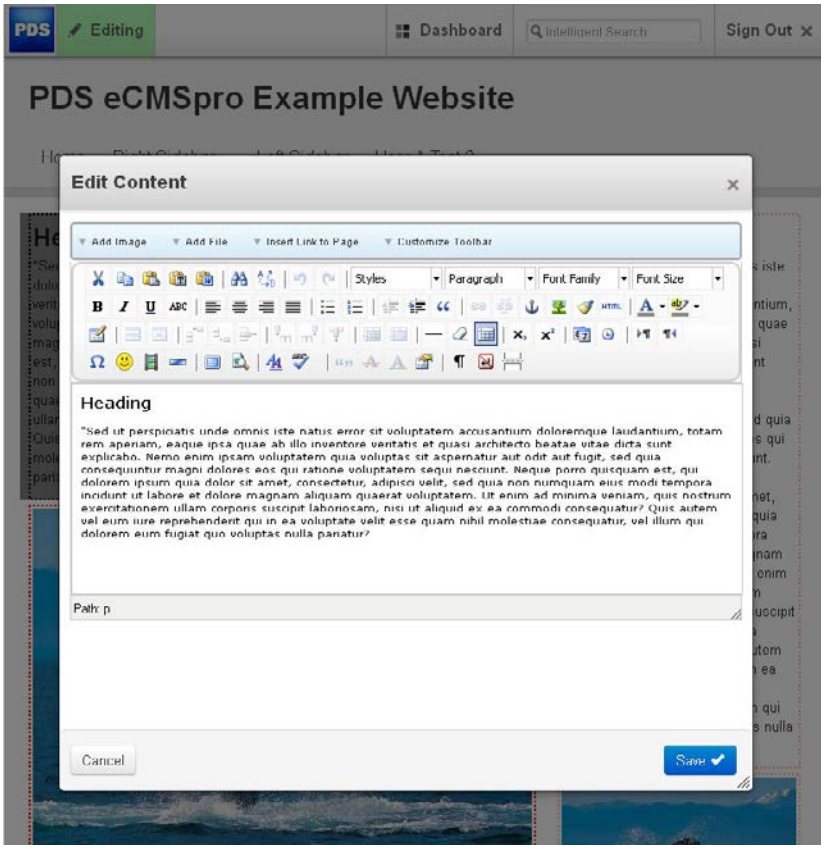
Continued...

5. After you have highlighted the block you wish to edit, click the left mouse button once. This will display the **Context Menu**.


PDS
Editing
Dashboard
Intelligent Search
Sign Out
PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
User A Test 2
Heading
Edit
Copy to Clipboard
Move
Delete
Design
Custom Template
Set Permissions
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit

6. Click the **Edit** command that appears at the top of the **Context Menu**.

7. The **Edit Content** window will appear. You can now edit the text content of this block using icons that are very similar to Microsoft Word.

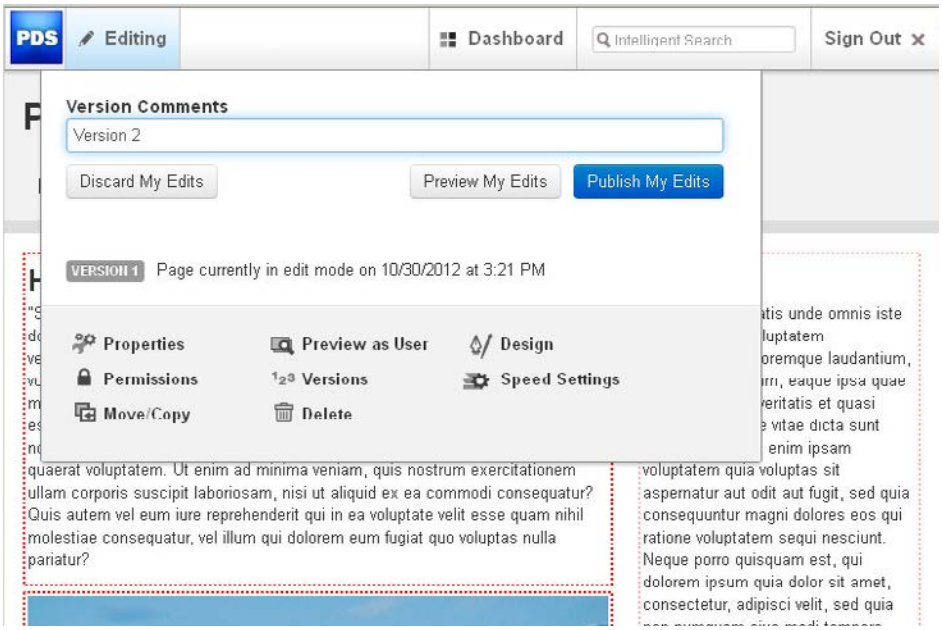


Continued...

8. Once you have completed your edits, click the blue **Save** button that appears in the lower right of the **Edit Content** window. The Edit Content window will disappear and you can now view your edits as they appear on the page.
9. If you are happy with your edits and wish to store them you must choose to either **Publish** the edits to make them visible to the public or **Preview** your edits to store them for further editing at a later date.

Publishing Edits

1. Click the **Editing** button that appears in the upper left hand corner of your screen to display the Editing Dropdown Menu.


PDS
Editing
Dashboard
Intelligent Search
Sign Out
Version Comments
Version 2
Discard My Edits
Preview My Edits
Publish My Edits
VERSION 1
Page currently in edit mode on 10/30/2012 at 3:21 PM
Properties
Preview as User
Design
Permissions
Versions
Speed Settings
Move/Copy
Delete
quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?
voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia

1. Click the blue **Publish My Edits** button to store the edits and make them available to the public.

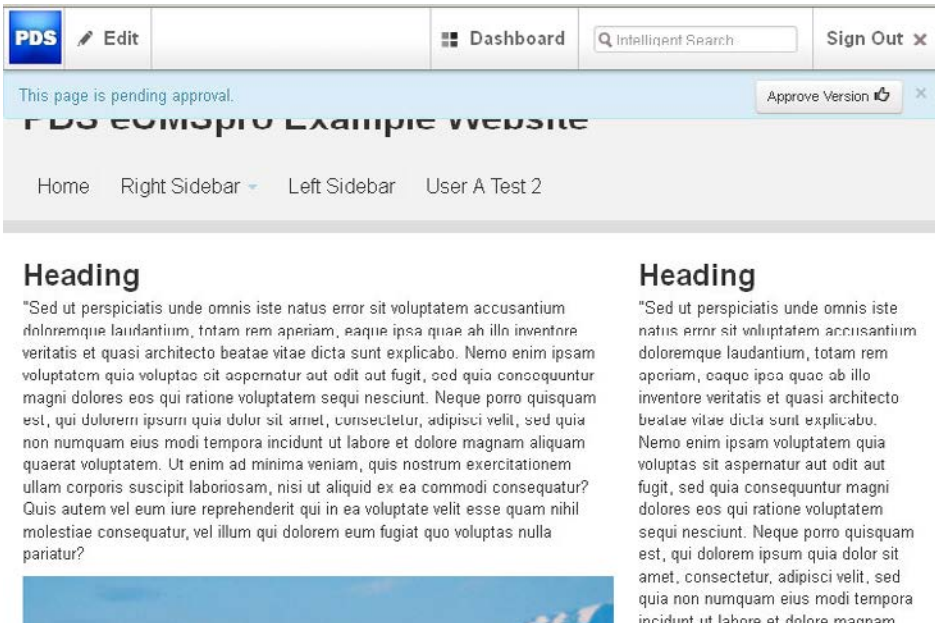
Previewing Edits

Previewing edits allows you to store an edited version of the page without making the edited version available to the public. If you do not have time to complete your edits in a single session this allows you to save your work and resume editing at a later time.

1. Click the **Editing** button that appears in the upper left hand corner of your screen to display the Editing Dropdown Menu.
2. Click the gray “Preview My Edits” button.
3. A new preview version of the page will be stored. **The preview version will only appear for users who have signed in to edit the site.**

Approving A Preview Version

If you are signed in to your site and viewing a preview version of a page you will see a light blue bar that reads “This page is pending approval” below the **Editing Toolbar**.


PDS
Edit
Dashboard
Intelligent Search
Sign Out
This page is pending approval.
Approve Version
Home
Right Sidebar
Left Sidebar
User A Test 2
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora

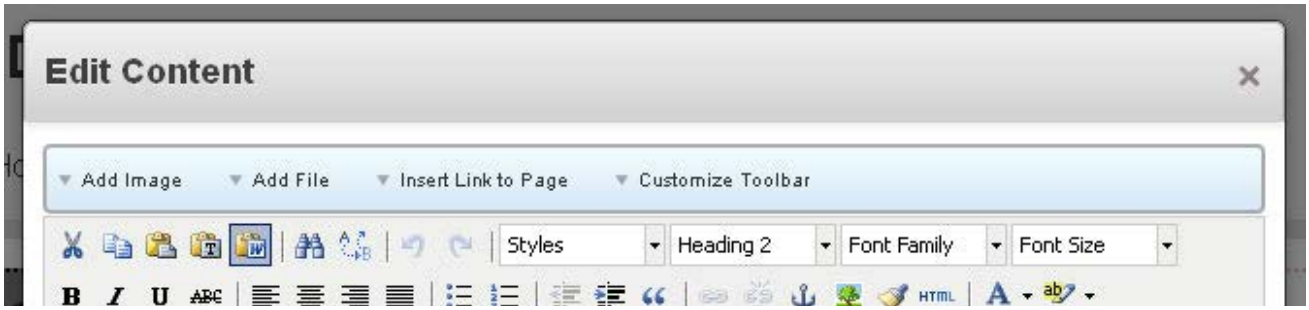
To make the preview version available to the public click the **Approve Version** button on the right hand side of the light blue bar.

Pasting Text

You may wish to copy existing text from Microsoft Word, Outlook or other sources into your site. When pasting copied text into your site it is important to always use the **Paste From Word** command. Text that is copied from outside programs contains hidden formatting that could result in undesired formatting when viewed by visitors. Using the **Paste from Word** command helps insure that this hidden formatting is removed and that your page will appear as you intend it to.

Using the Paste from Word Command

1. In your external program, select and copy the text you wish to paste
2. With the **Edit Content** window open, click inside the text area to position your blinking cursor where you would like the pasted text to appear
3. Click the **Paste from Word** icon on the Edit Content toolbar.



Continued...

4. The **Paste from Word** window will appear. Click inside the white square and use the CONTROL+V keyboard shortcut key combination to paste your copied text.
5. Click the Update button that appears in the lower left corner of the **Paste from Word** window
6. The **Paste from Word** window will disappear and your pasted text will appear at the location of your blinking cursor

Add an Image to a Content Block

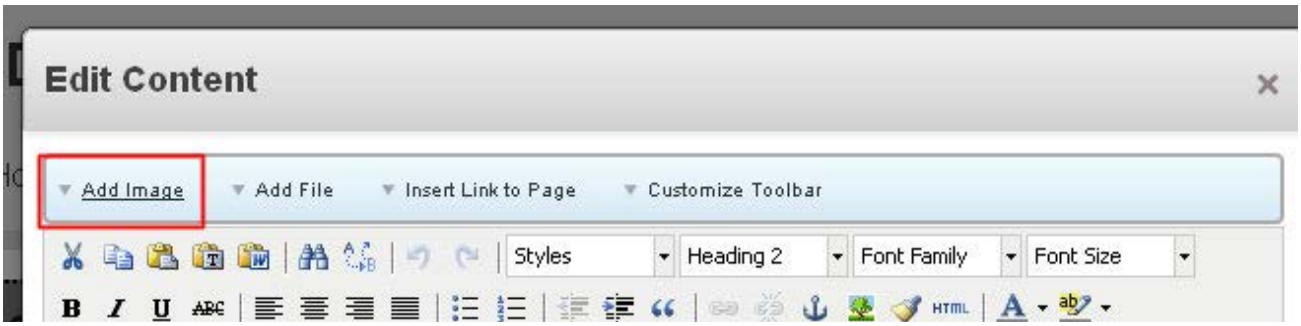
You can display text and images inside content blocks on your site. It is important to format images correctly to insure a fast and positive experience for visitors who view your site. Displaying images on your site that are too large could result in your site taking minutes instead of seconds to load and frustrate visitors.

Please keep the following in mind:

- Your website is approximately 1000 pixels in width.
- Photos from digital cameras or camera phones range on average between 3000 pixels in width and 5000 pixels in width.
- All images should be resized to no more than 500 pixels in width before being uploaded or displayed.
- We recommended software such as Adobe Photoshop Elements for resizing images.

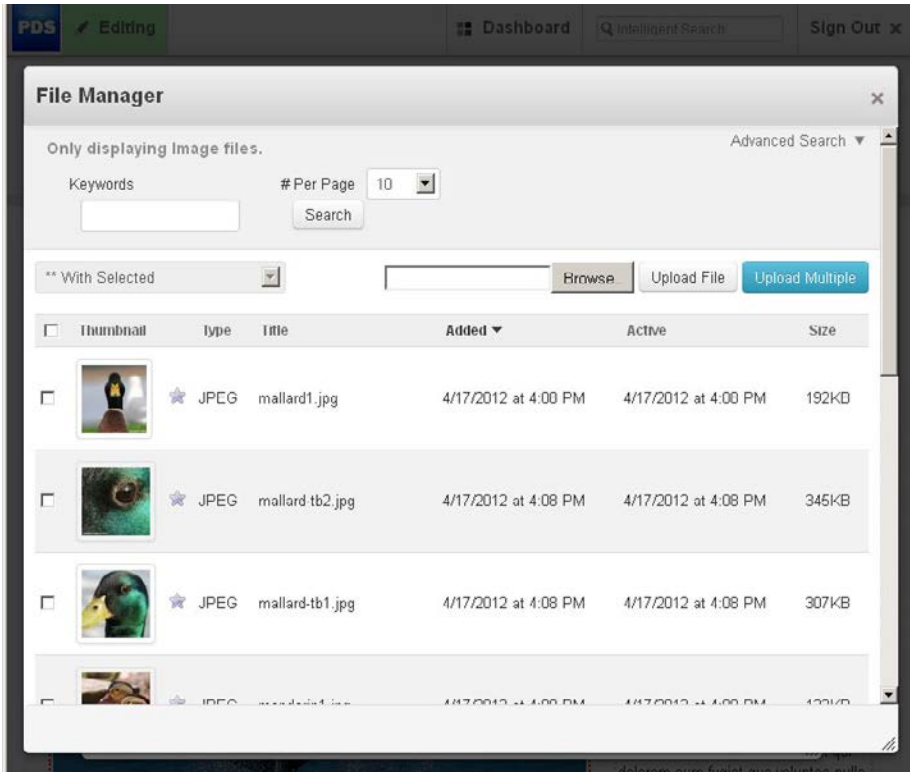
Upload an Image

1. With the **Edit Content** window open, click inside the text area to position your blinking cursor where you would like the image to appear.
2. Click the **Add Image** command



3. The **File Manager** window will appear. The **File Manager** is used for uploading and choosing images and documents that are displayed on your site.

Continued...

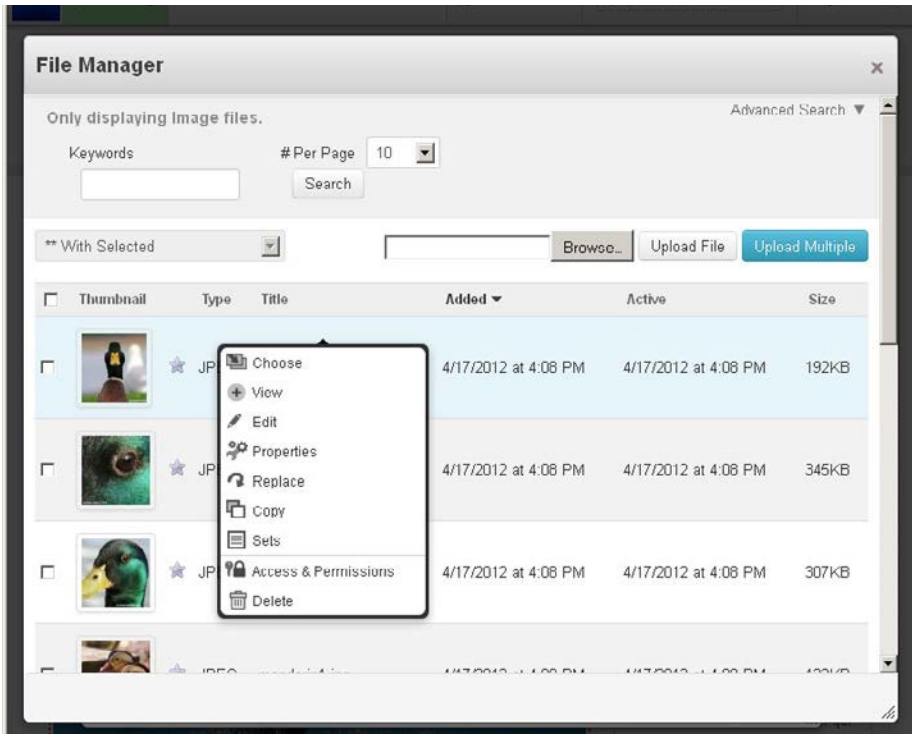


3. The **File Manager** window will appear. The **File Manager** is used for uploading and choosing images and documents that are displayed on your site.
4. Click the **Browse** button. A file selection window will appear that allows you to locate the image you wish to upload on your computer. Locate the image, click the name of the image file and then click the **OK** button.
5. The location of the image file you selected on your computer now appears in the area to the right of the **Browse** button. Click the **Upload** button to upload the image.
6. Once the upload is complete the **Upload Success** window appears. Click **OK** to continue.

Choose an Image

1. Now that the image is uploaded you can choose to insert it into your content block. Locate the file name of the image that you uploaded in the listing of images that is displayed by the **File Manager**.
2. Click the file name of the image once with your left mouse button. The **File Context Menu** will appear.

Continued...



3. Click the **Choose** command that appears at the top of the File Context Menu.
4. The **File Manager** will disappear and your image will appear in your content block at the location of your blinking cursor.

Adjusting Image Properties

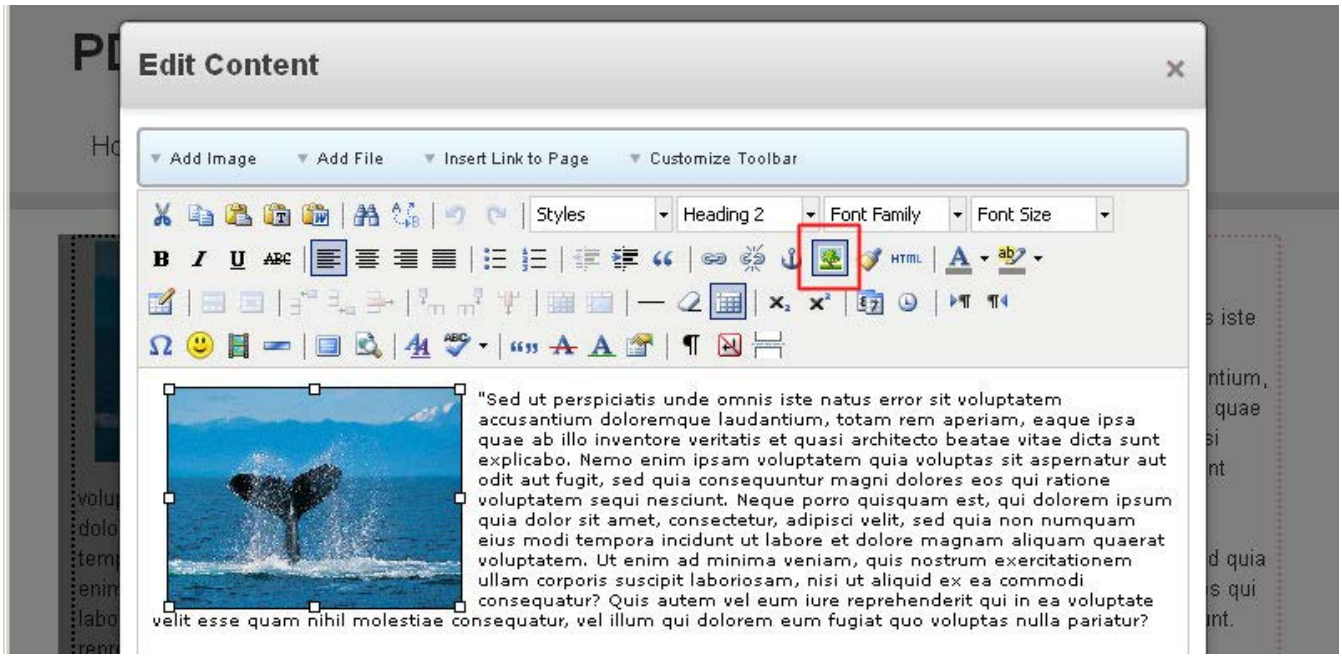
You may want your image to appear either to the left or right of the text in your content block, such as in the example below.

PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam,

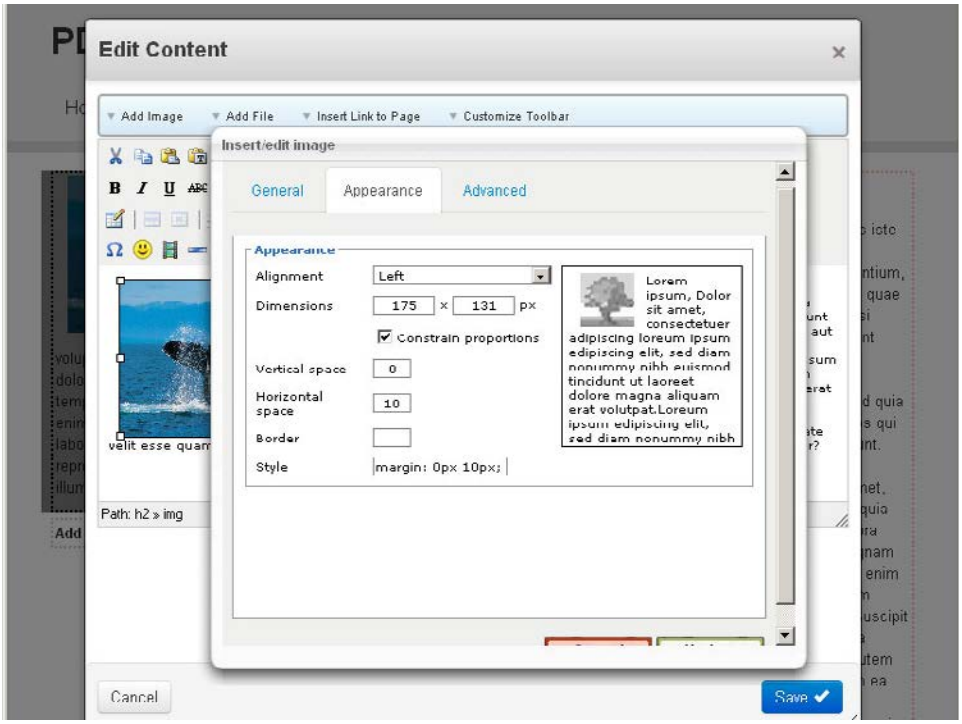
Continued...

Follow the steps below to align the image that you inserted to the left or right of your text.

1. Click the image once with your left mouse button to select it. White squares will appear at each corner of the image to confirm that it has been selected.
2. Click the **Edit / Insert Image** icon that appears on the icon bar.


Edit Content
Add Image
Add File
Insert Link to Page
Customize Toolbar
Styles
Heading 2
Font Family
Font Size
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

3. The **Edit / Insert Image** window will appear. Click the **Appearance** tab to display the **Appearance** controls.



Continued...

4. Locate the **Alignment** control and click the arrow pointing down to display the list of **Alignment** options. Select either the **Left** or **Right** option.

3. After selecting either the **Left** or **Right** option you will notice the illustration that is displayed on the **Appearance** tab changes to reflect your choice.

4. The **Vertical Space** and **Horizontal Space** controls allow you to add a buffer between the image and the text that appears around it. Type the number 10 into **Vertical Space** and **Horizontal Space**.

5. Scroll down so that you can see the green **Update** button that appears in the lower right. Click the green **Update** button.

6. The **Insert / Edit Image** window will disappear. Your image will now be aligned to either the left or right of your text.

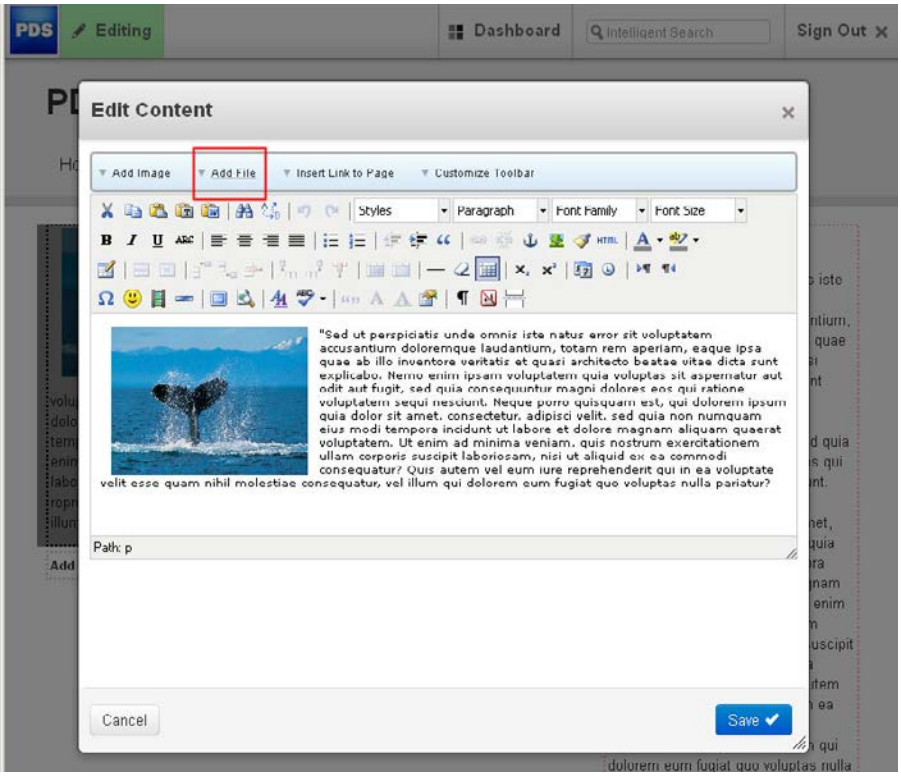
Link to a PDF File

The steps to create a link to a PDF file are similar to the steps for displaying an image. Follow the steps below to create a link to a PDF file in a Content Block:

Upload a PDF File

Follow the steps below to upload the PDF file you wish to create a link to if it has not been uploaded to your site in the past. If the PDF file has already been uploaded, skip to the section **Choose the PDF File** section below.

1. With the **Edit Content** window open, click inside the text area to position your blinking cursor where you would like the new PDF link to appear.
2. Click the **Add File** link on the **Edit Content** window toolbar.

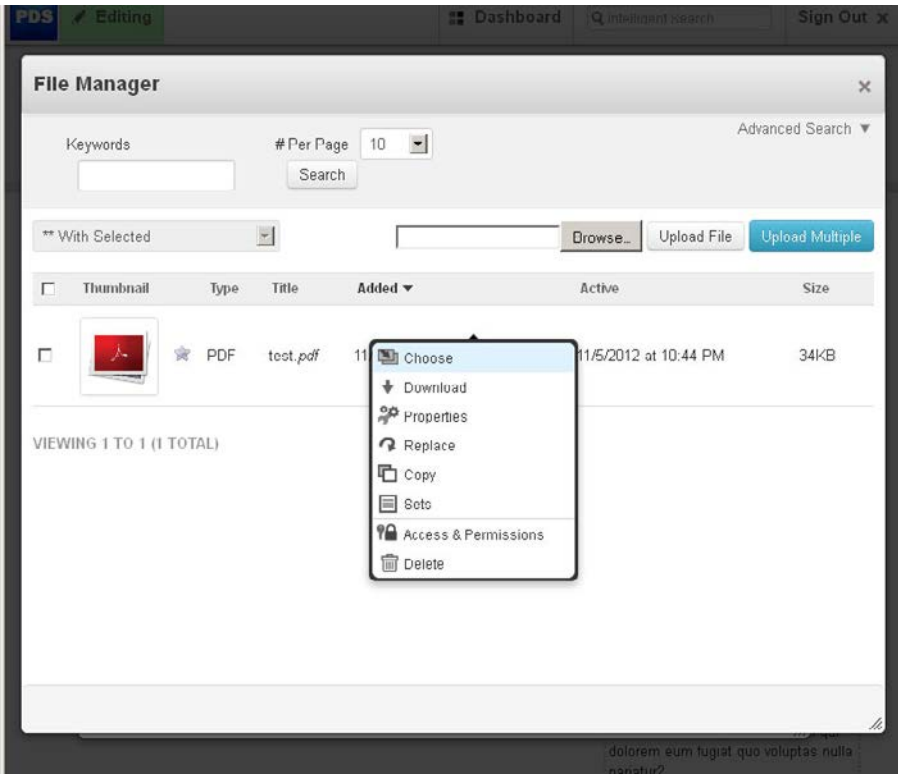


3. The **File Manager** window will appear. The **File Manager** is used for uploading and choosing images and documents that are displayed on your site.
4. Click the **Browse** button. A file selection window will appear that allows you to locate the PDF you wish to upload on your computer. Locate the PDF, click the name of the PDF file and then click the **OK** button.
5. The location of the PDF file you selected on your computer now appears in the area to the right of the **Browse** button. Click the **Upload** button to upload the PDF.
6. Once the upload is complete the **Upload Success** window appears. Click **OK** to continue.

Continued...

Choose the PDF File

1. Now that the PDF file has been uploaded you can choose to insert a link to it in your Content Block. Locate the file name of the PDF File you wish to link to in the listing of files that is displayed by the **File Manager**.
2. Click the file name of the PDF file once with your left mouse button. The **File Context Menu** will appear.
3. Click the **Choose** command that appears at the top of the **File Context Menu**.

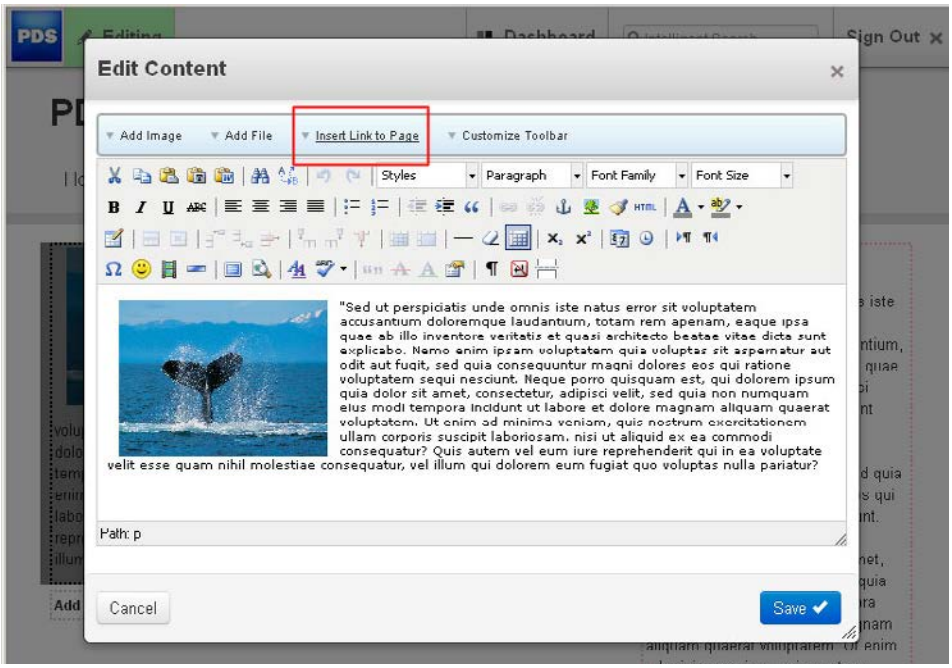


4. The File Manager will disappear and a text link to the PDF file will appear in your content block at the location of your blinking cursor.
5. If you wish to edit the text that is linked to the PDF file, use your keyboard arrow keys to position your blinking cursor inside the link and then use your backspace and delete keys to edit the text.

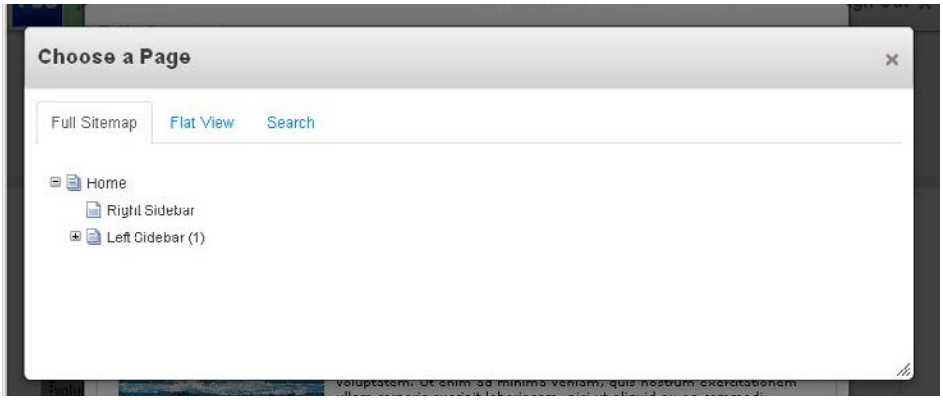
Link to Another Page on Your Site

You can easily create links to other pages on your side inside **Content Blocks**.

1. With the **Edit Content** window open, click inside the text area to position your blinking cursor where you would like the link to appear.
2. Click the **Insert Link to Page** command that appears on the **Edit Content** window toolbar.



3. The **Choose a Page** window will appear. The **Choose a Page** window displays a tree that lists all the pages on your site.

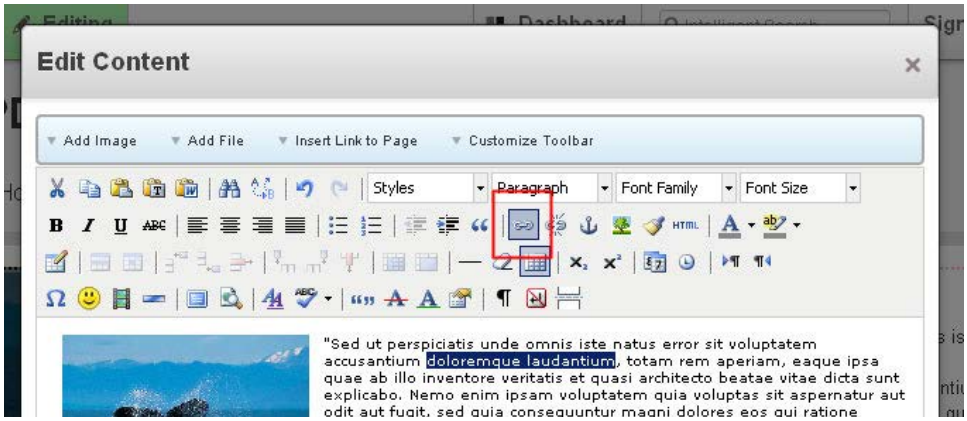


4. If necessary, use the addition symbols that appear to the left of pages listed in the tree to expand the listing so that you can see the name of the page you wish to create a link to.
5. Once the name of the page you wish to link to is visible, click the name of the page.
6. The **Choose a Page** window will disappear. A text link to the page you selected will appear in your Content Block at the location of your blinking cursor.
7. If you wish to edit the text that is linked to the page you selected, use your keyboard arrow keys to position your blinking cursor inside the link and then use your backspace and delete keys to edit the text.

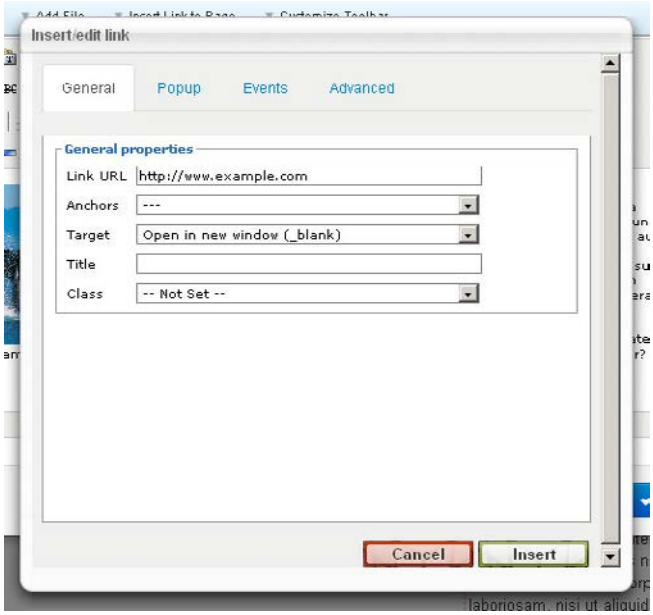
Link to Page That is Not on Your Site

Follow the steps below if you would like to create a link to an external website that is not part of your own site.

1. With the **Edit Content** window open, click inside the text area to position your blinking cursor where you would like the link to appear.
2. Type the text that you would like to be linked to the external site.
3. Click and drag with your mouse to highlight this text.
4. Click the **Insert / Edit Link** icon on the icon bar of the **Edit Content** window.



5. The **Insert / Edit Link** window will appear. Type the address of the external site you wish to link to inside the **Link URL** field. Be sure to include **http://www.** at the start of the address.
6. Change the **Target** option to **"Open in new window (_blank)"**. This will prevent visitors from being completely directed away from your website when they click the link.



7. Click the green **Insert** button in the lower right of the **Insert / Edit Link** window.
8. The **Insert / Edit Link** window will disappear. The text that you typed in Step 2 will now be linked to the address that you entered in Step 5.

Working With Blocks

Most text and images that appear on your site are contained in blocks. PDS eCMSpro includes a wide variety of blocks for specialized purposes, however the **Content Block**, **Image Block** and **Form Block** will be the only blocks you will need to work with for almost all the content on your site.

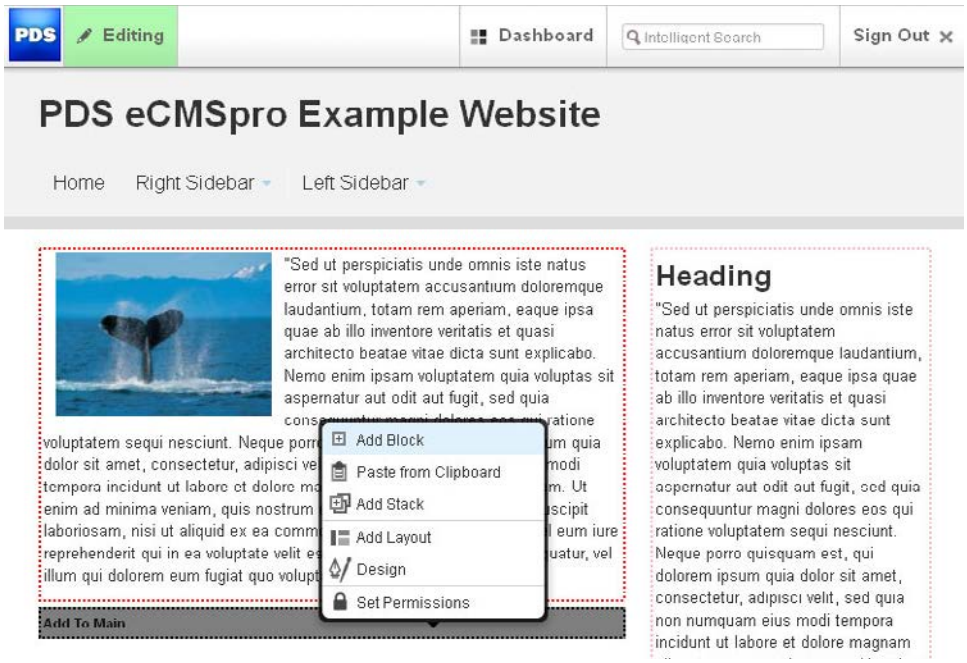
Image Block

PDS eCMSpro includes the **Image Block** as an alternative choice for adding individual images to the pages of your site. If you would like to have an image appear aligned to the left or right of text that appears on a page of your site, please see the section titled **Add an Image to a Content Block**.

The **Image Block** allows you to add individual images to your site in such a way that they are contained in their own blocks that can be easily moved in relation to the other blocks on a page. Using the **Image Block** is a good choice if you will be including images that you may want to rearrange that will not need to be aligned to the left or right of text.

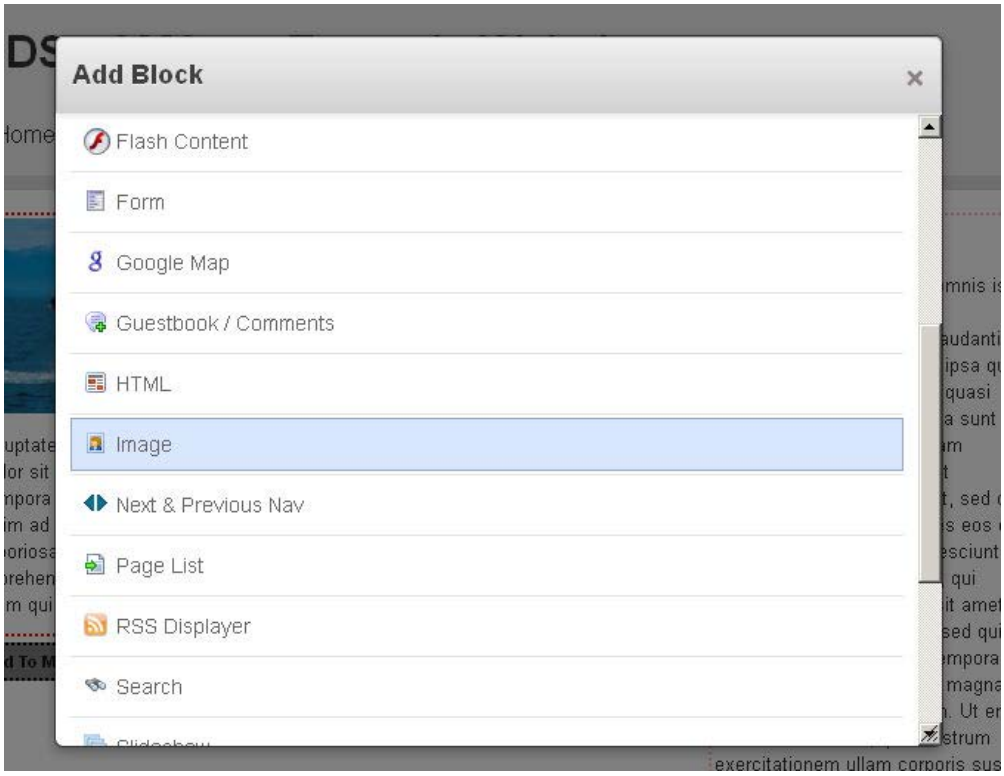
Adding an Image Block

1. Visit a page on your site and place it in **Edit Mode** by clicking the **Edit** button in the upper left hand corner.
2. Once the page appears in **Edit Mode**, identify the area of the page that is surrounded by a dashed outline and reads **Add to Main**.
3. Roll your mouse over the **Add to Main** section of the page. The **Add to Main** section will be highlighted in gray. Click the highlighted **Add to Main** section once with your left mouse button.
4. The **Context Menu** will appear. Click the **Add Block** command.

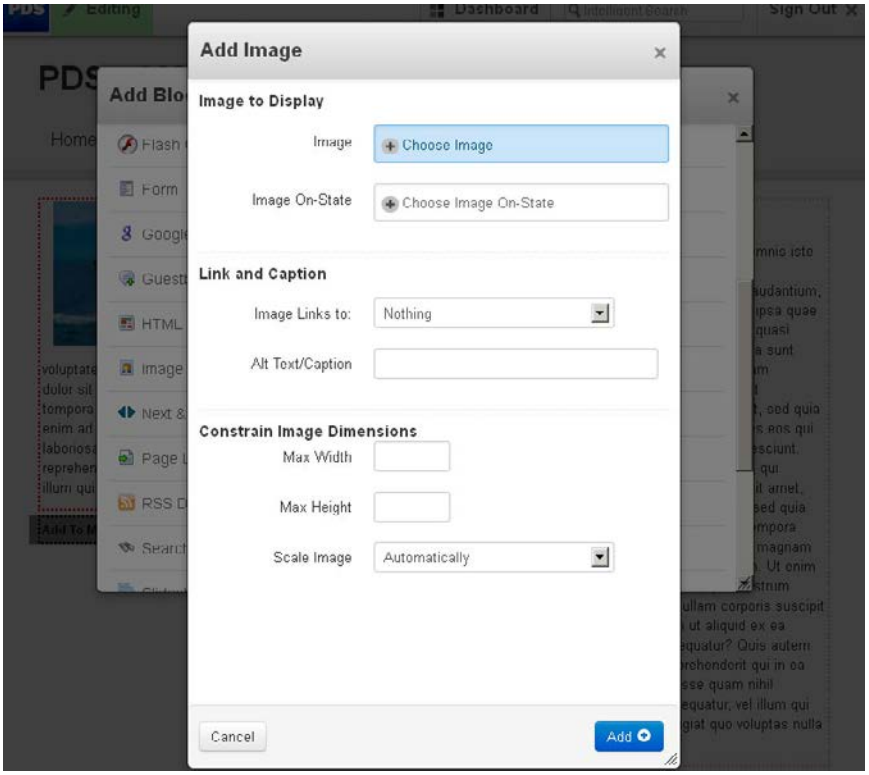


Continued...

5. The **Add Block** window will appear. Locate the **Image** item in the listing and click it once with your left mouse button.



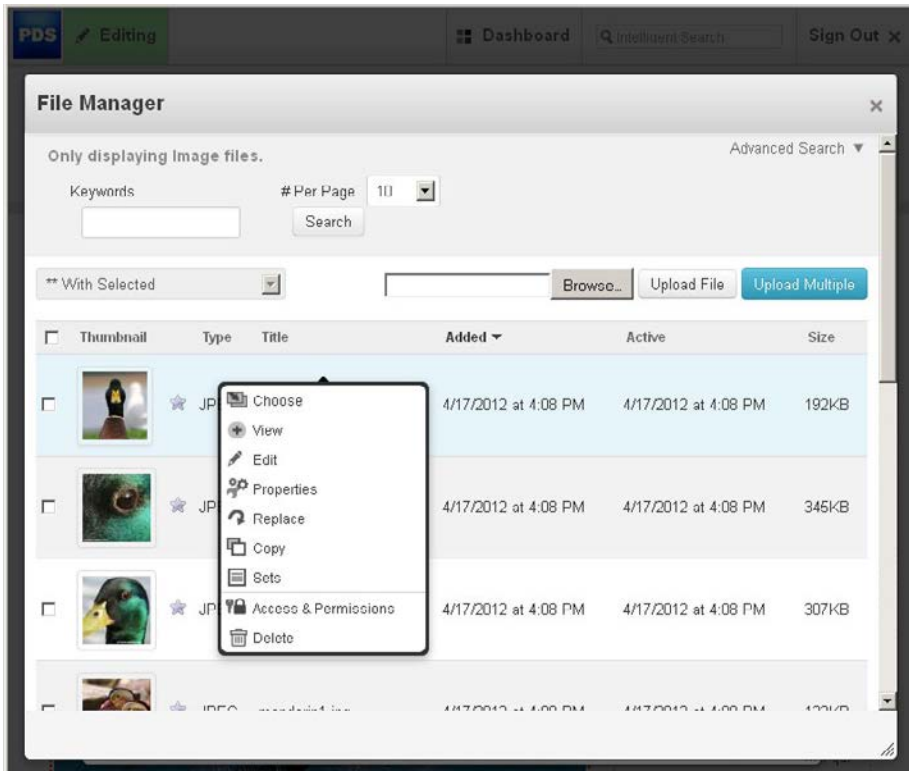
6. The **Add Image** window will appear. Click the **Choose Image** item.



Continued...

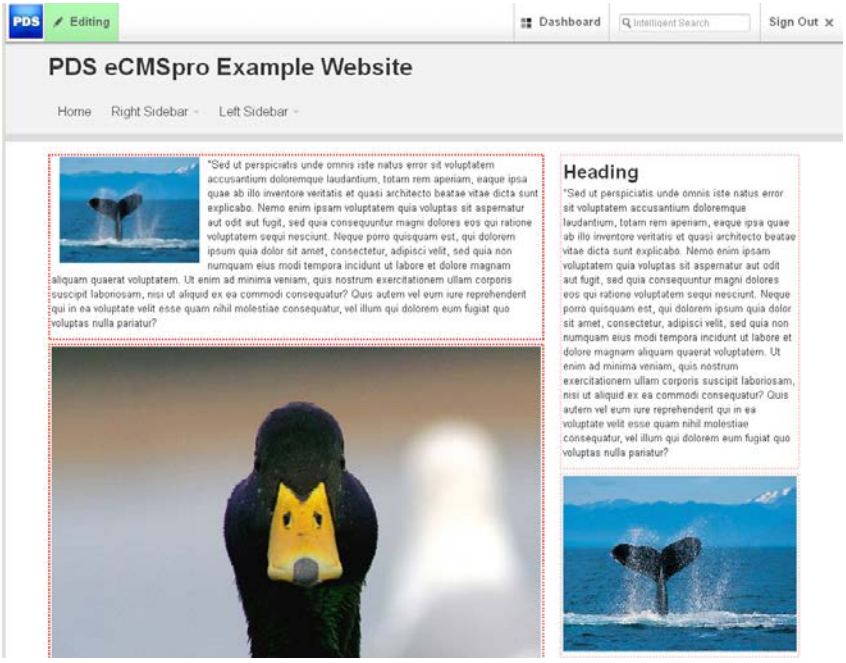
7. The **File Manager** window will appear. Use the **File Manager** to locate the image you would like to place on your page.

8. Once you have located the image you would like to place on your page, click the file name of the image once with your left mouse button. The **File Context Menu** will appear. Click the **Choose** command that appears at the top of the **File Context Menu**.



9. The **File Manager** window will disappear and you will be returned to the **Add Image** window. Locate the blue **Add** button that appears in the lower right hand corner of the **Add Image** window and click it once with your left mouse button.

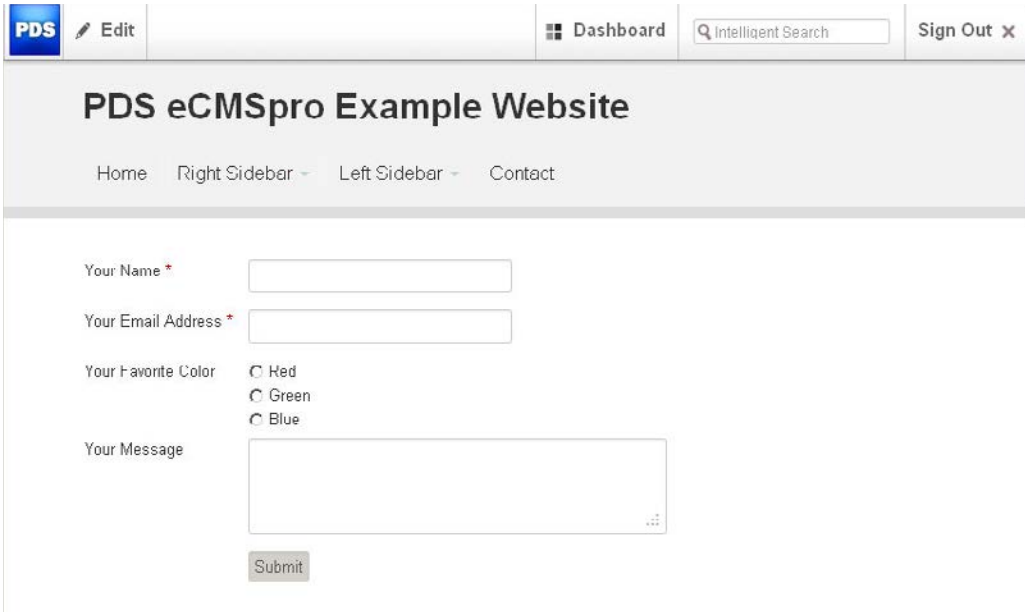
10. The image that you selected from the **File Manager** will now appear on the page in it's own **Image Block**.



Form Block

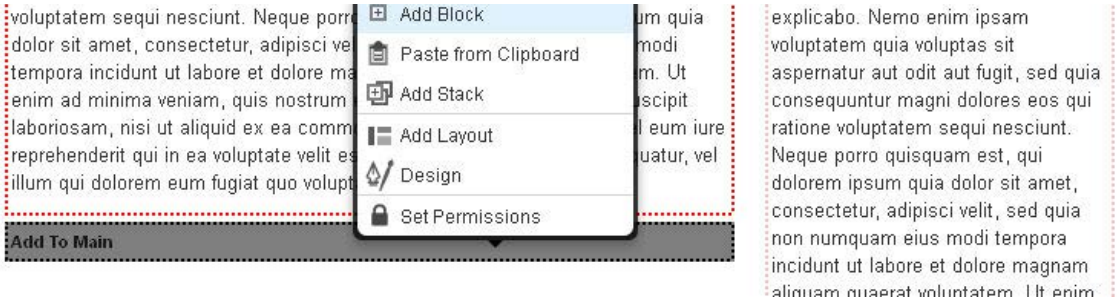
The **Form Block** allows you to create a set of questions that your visitors can answer to communicate with you. When a visitor fills out a **Form Block** their response will be emailed to you and saved in your PDS eCMSpro **Dashboard**. If your website includes a Contact Form, it has been created using the **Form Block**.

For this exercise we will create a simple contact form with four questions that match the questions in the example below:



Adding a Form Block

1. Visit a page on your site and place it in **Edit Mode** by clicking the **Edit** button in the upper left hand corner.
2. Once the page appears in **Edit Mode**, identify the area of the page that is surrounded by a dashed outline and reads **Add to Main**.
3. Roll your mouse over the **Add to Main** section of the page. The **Add to Main** section will be highlighted in gray. Click the highlighted **Add to Main** section once with your left mouse button.
4. The **Context Menu** will appear. Click the first command in the Context Menu that reads **Add Block**.


Add Block
Paste from Clipboard
Add Stack
Add Layout
Design
Set Permissions
Add To Main
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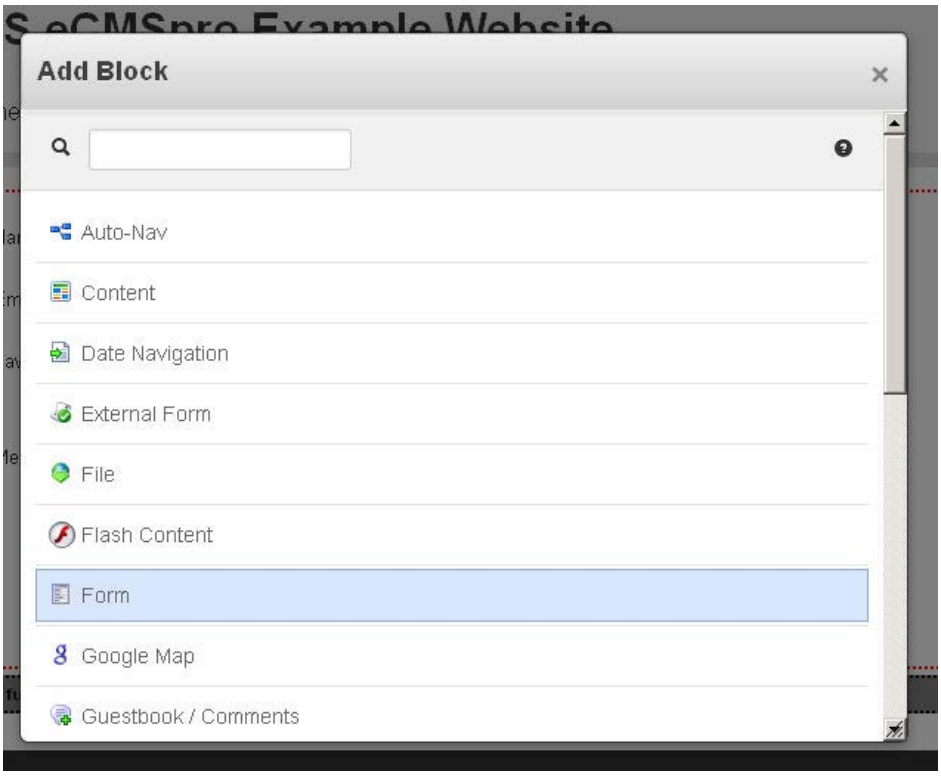
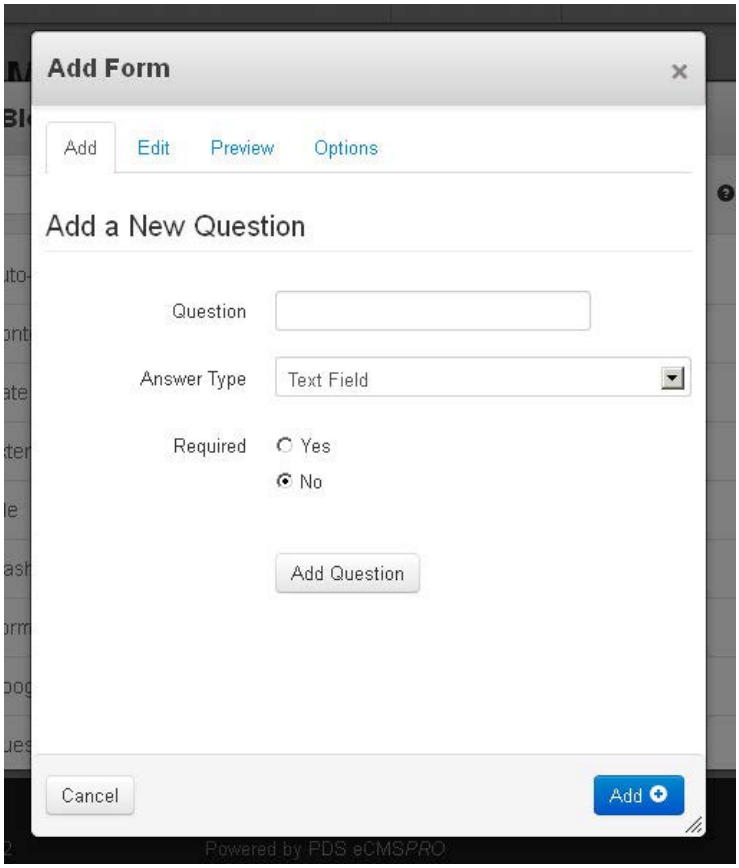
5. The **Add Block** window will appear. Locate the **Form** item in the listing of and click it once with your left mouse button.

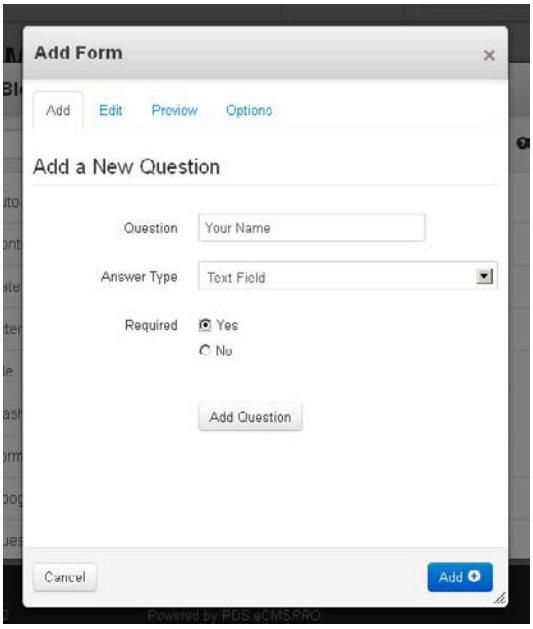


6. The **Add Form** window will appear and display the Add tab. The **Add Form** window includes four tabs: Add, Edit, Preview and Options.

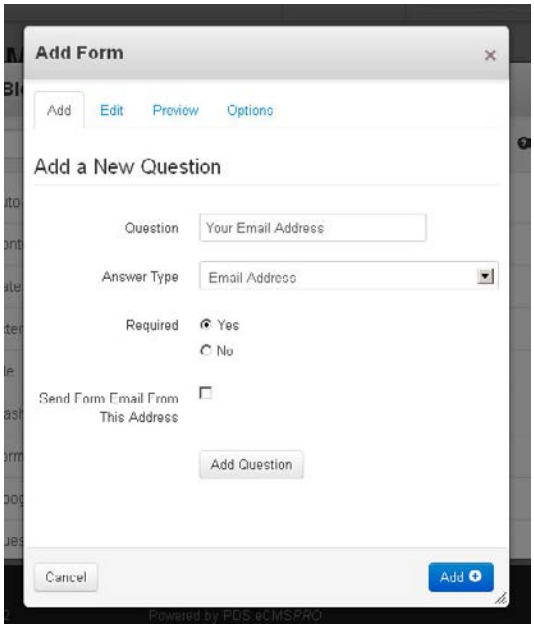


Continued...

7. The **Add** tab prompts you to “Add a New Question.” Enter the text “Your Name:” in the **Question** field.
8. Change the **Required** option to Yes. Visitors that fill out this form on your site will now be required to provide their name.

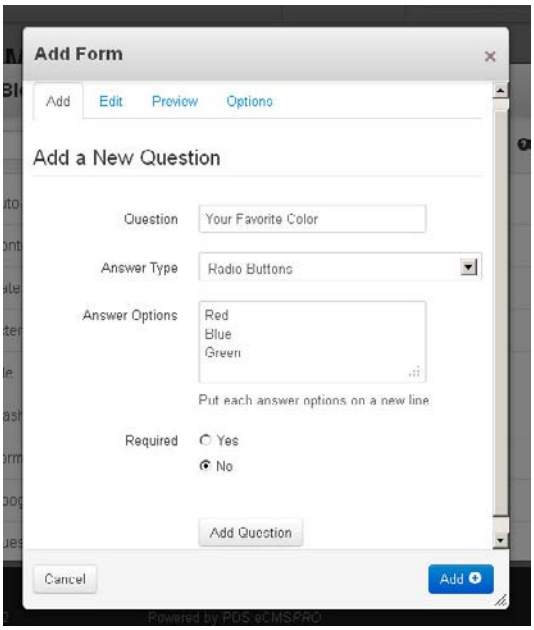


9. Click the white **Add Question** button. The message “`Your question has been added. To view it click the preview tab” will appear above the Question field.
10. The **Add New Question** tab is reset. This allows you to add an additional question.
11. Type the text “Your Email Address” into the **Question** field.
12. Change the **Answer Type** option to **Email Address**. This will require visitors who fill out the form to provide a valid email address.
13. Change the **Required** option to **Yes**. Visitors that fill out this form on your site will now be required to complete this question to submit the form.

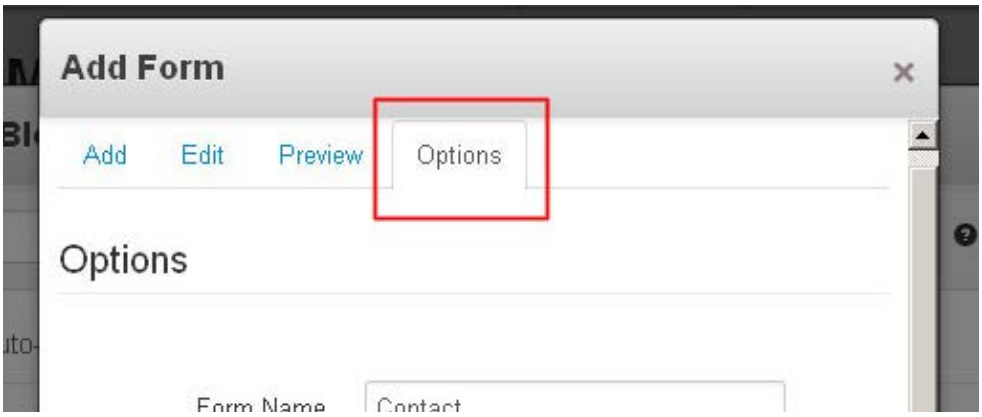


Continued...

14. Click the white **Add Question** button. The message "`Your question has been added. To view it click the preview tab" will appear above the **Question** field.
15. Type the text "Your Favorite Color" into the **Question** field.
16. Change the **Answer Type** option to **Radio Buttons**.
17. After selecting the **Radio Buttons** Answer Type, the **Answer Options** field will appear below **Answer Type**.
18. Type the text "Red", "Blue", "Green" inside the **Answer Options** field with each color on a separate line.



19. Click the white **Add Question** button. The message "Your question has been added. To view it click the preview tab" will appear above the **Question** field.
20. Type the text "Your Message" into the **Question** field.
21. Change the **Answer Type** option to **Text Area**.
22. Click the white **Add Question** button. The message "`Your question has been added. To view it click the preview tab" will appear above the **Question** field.
23. Click the **Options** tab that appears at the top of the **Add Form** window.



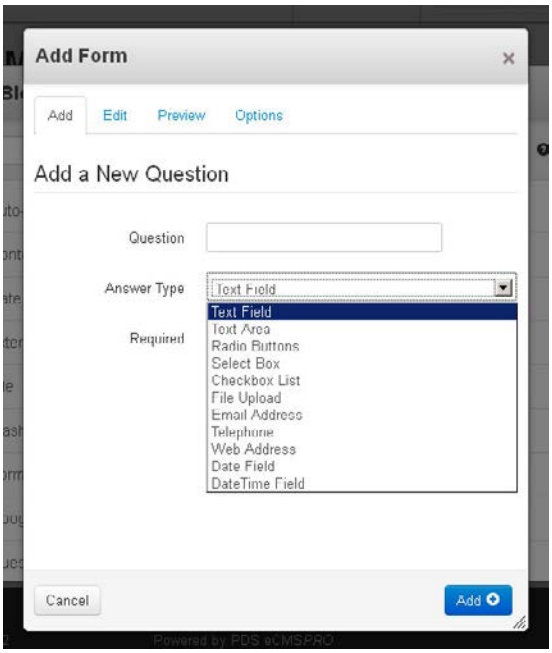
Continued...

24. Check the checkbox for the **Notify me by email when people submit this form** option and enter your email address. You will receive an email when this form is completed by visitors to your site.
25. Change the **Solving a CAPTCHA Required to Post?** Option to **Yes**. This option will require visitors to complete a security code to submit this form. **This is an important step that will protect you from receiving SPAM email messages that are sent by automated programs that scan the internet for forms that do not include security codes.**
26. Click the blue **Add** button that appears in the lower right hand corner of the **Add Form** window.
27. The new **Form Block** now appears on your site. You can **Publish** this page to make the form publicly accessible.

Form Block Answer Types

The **Form Block** includes a variety of **Answer Types** for various purposes. If you have published the page that you created the **Form Block** on, place it in **Edit Mode** by clicking the **Edit** button in the upper left hand corner. If the page you created the **Form Block** on is still in **Edit Mode**, follow the steps below to review the additional **Form Block Answer Types**.

1. Roll you mouse over the form so that it is highlighted in gray.
2. Click the form once with your left mouse button the display the **Context Menu**.
3. Click the **Edit** command that appears at the top of the **Context Menu**.
4. The **Edit Form** window will appear. Click the **Add** tab to display the **Add New Question** options.
5. Click the **Answer Type** option to display the listing of **Answer Types**.



Continued...

The Form Block includes a variety of Answer Types for different purposes:

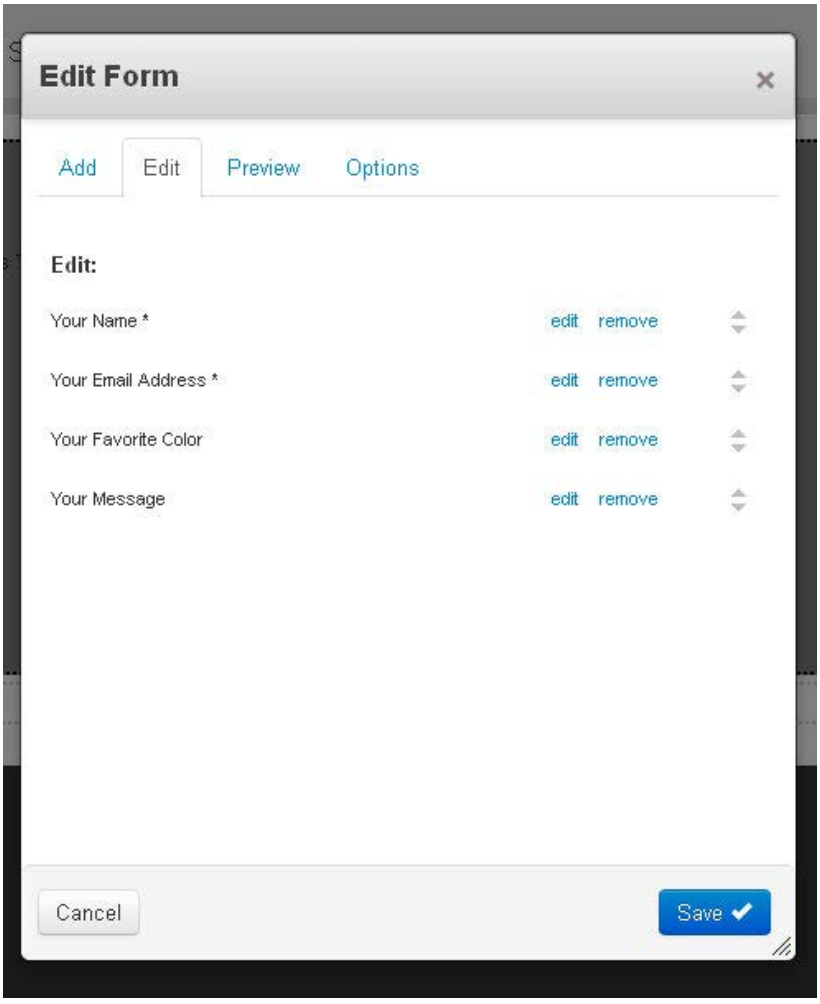
- **Text Field**: Used for basic questions such as “Your Name”
- **Text Area**: Used for questions where the respondent is expected to enter more than a few words.
- **Radio Buttons**: Used when respondents must select a single answer from a list of predefined answers. All predefined answers are displayed for the respondent.
- **Select Box**: Used when respondents must select a single answer from a list of predefined answers. Only one predefined answer is displayed a time. Respondents must click to see the full list.
- **Checkboxes**: Used when respondents can select more than one answer from a list of pre-defined answers.
- **File Upload**: Used when respondents must be able to include a file from their computer with their response, such as a resume or image.
- **Email Address**: Used when respondents must provide a valid email address.
- **Telephone**: Used when respondents must provide a valid telephone number.
- **Web Address**: Used when respondents must provide a valid website address.
- **Date Field**: Used when respondents must provide a calendar date.
- **DateTime Field**: Used when respondents must provide a calendar date and time of day.

These answer types give you the opportunity to request a wide variety of information from visitors to your site.

Editing Form Block Questions

Follow the steps below to edit a question in a **Form Block**.

1. Roll you mouse over the form so that it is highlighted in gray.
2. Click the form once with your left mouse button to display the **Context Menu**.
3. Click the **Edit** command that appears at the top of the **Context Menu**. The **Edit Form** window will appear.
4. Click the **Edit** tab. A listing of all the questions in the form will appear.



5. Locate the Favorite Color question in the listing. Click the blue **edit** link that appears to the right of Favorite Color.
6. The **Edit Question** fields for Favorite Color appear. Add an additional color to the **Question Options** field.
7. Click the blue **Save Changes** button. The **Edit Question** field will disappear and a message reading “Your Question has been edited” appears to confirm the change.
8. Click the blue **Save** button in the lower right hand corner of the **Edit Form** window to store this change.

Continued...

Follow the steps below to **Rearrange** questions in a Form Block.

1. Roll your mouse over the form so that it is highlighted in gray.
2. Click the form once with your left mouse button to display the **Context Menu**.
3. Click the **Edit** command that appears at the top of the **Context Menu**. The **Edit Form** window will appear.
4. Click the **Edit** tab. A listing of all the questions in the form will appear.
5. Locate the Favorite Color question in the listing. The triangles pointing up and down, located at the right of the listing for the Favorite Color question, control the order of the question in the form.
6. Click the triangle pointing up to move the question up in the order of questions.
7. Click the blue **Save** button in the lower right hand corner of the Edit Form window to store this change.

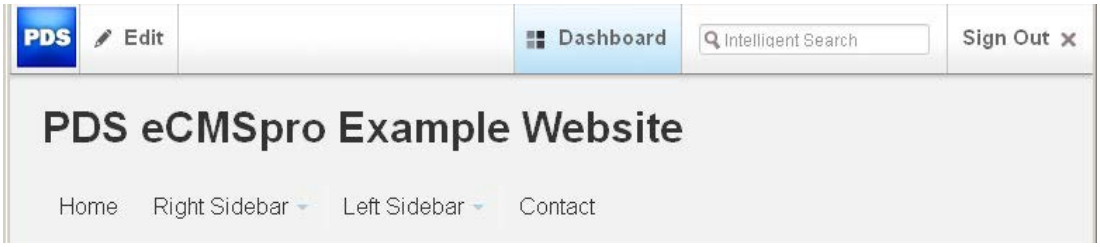
Follow the steps below to **Remove** a question from a Form Block

1. Roll you mouse over the form so that it is highlighted in gray.
2. Click the form once with your left mouse button the display the **Context Menu**.
3. Click the **Edit** command that appears at the top of the **Context Menu**. The **Edit Form** window will appear.
4. Click the **Edit** tab. A listing of all the questions in the form will appear.
5. Locate the Favorite Color question in the listing. Click the blue **Remove** link that appears to the right of the text Favorite Color. The Favorite Color will disappear form the form.
6. Click the blue **Save** button in the lower right hand corner of the **Edit Form** window to store this change.

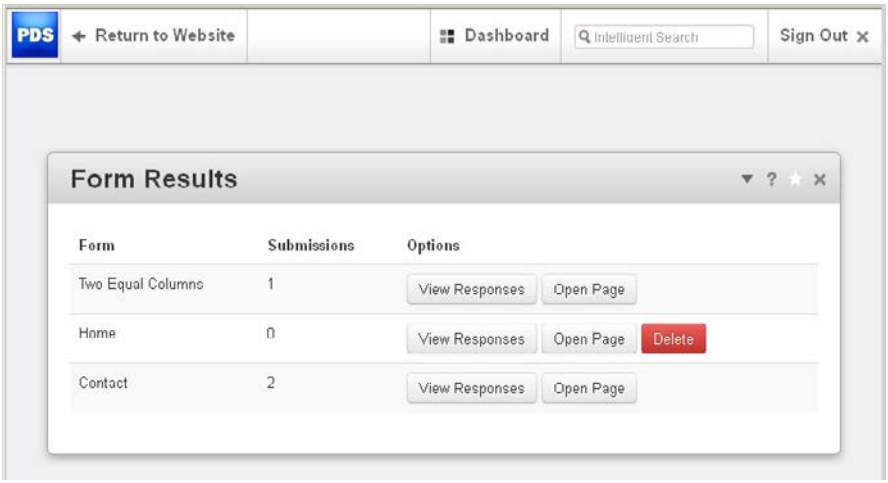
Reviewing Form Responses

Follow the steps below to review responses to forms using the **Dashboard**

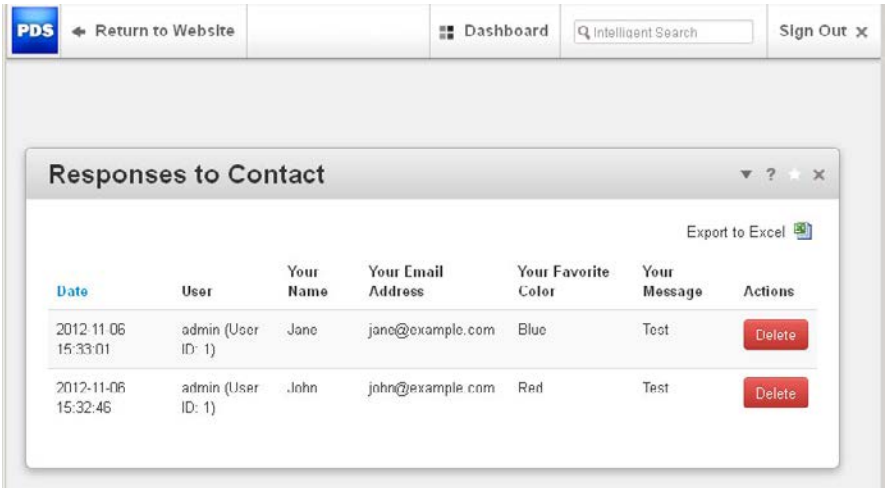
1. Click the **Dashboard** button that appears on the right hand side of the editing tool bar.
2. The **Dashboard** screen will appear. Locate the section of the **Dashboard** titled **Reports**. Click the **Form Results** item in this section.



3. The **Form Results** section will appear. This section includes a listing of all the forms that appear on your website. Each form is identified by the name of the page that it appears on.

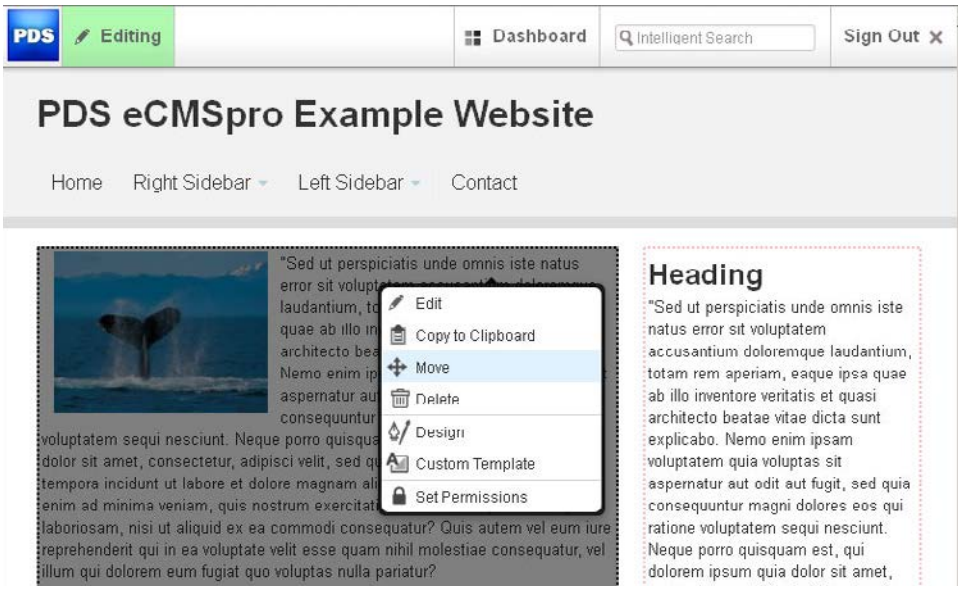


4. Each listing on the **Form Results** page includes a link to **View Responses**. Select a form and click the **View Responses** link.
5. The **Responses** screen will appear. The **Responses** screen contains a grid that lists each individual question that appears on the form in a column and each individual response to the form in a row. You can use this screen to easily review all the responses to the form.



Move a Block

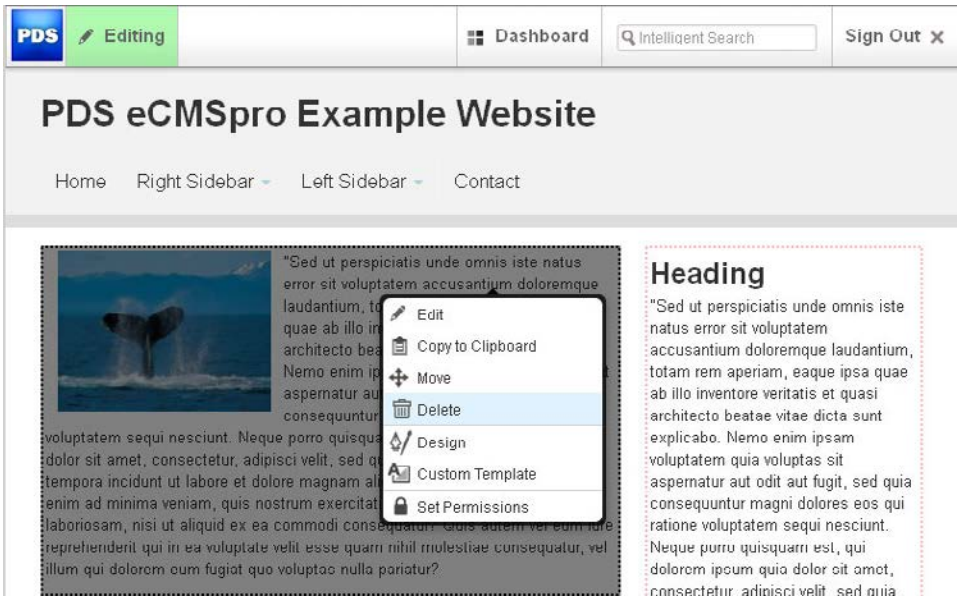
1. Visit a page on your site that contains more than one block and place it in **Edit Mode** by clicking the **Edit** button in the upper left hand corner of your screen.
2. Once the page appears in **Edit Mode**, roll your mouse over a block. Once the block is highlighted in gray, click it once with your left mouse button to display the **Context Menu**.
3. Click the **Move** command that appears on the **Context Menu**


PDS
Editing
Dashboard
Intelligent Search
Sign Out
PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
Contact
Edit
Copy to Clipboard
Move
Delete
Design
Custom Template
Set Permissions
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet,

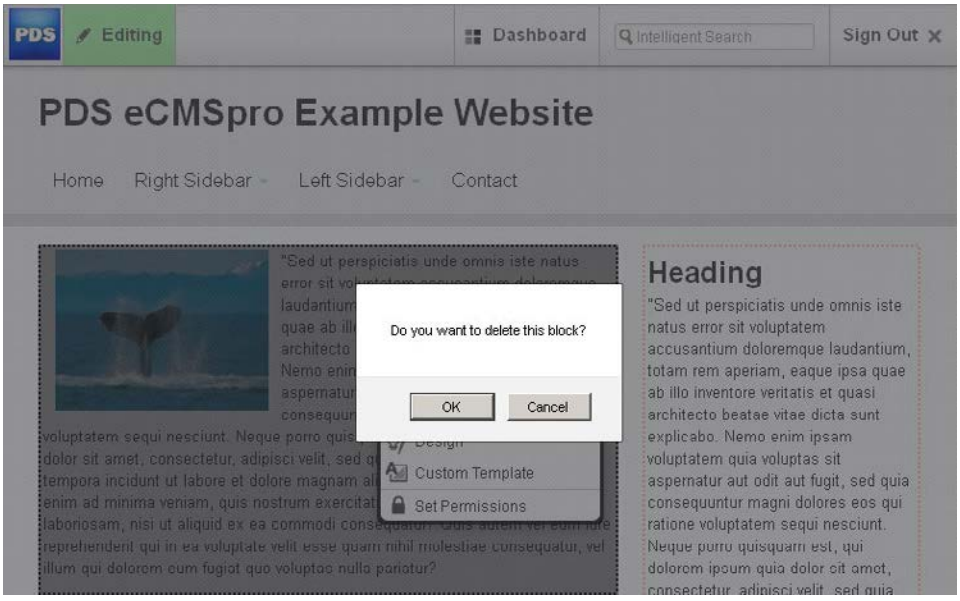
4. Your mouse cursor will change into a black four-way arrow. Position your mouse over any block. The dashed red outline of the block your mouse is positioned over will change to a dashed black outline.
5. Click and hold your left mouse button. While continuing to hold your left mouse button, drag the block up or down. As you drag the block up or down, you will see the other blocks on the page move to accommodate the new position of the block you are moving.
6. When you have moved the block to the location you wish it to appear, release the left mouse button. The block will appear in its new location.
7. To save this change, click the **Editing Button** in the upper left hand corner of your screen to display the **Editing Menu** then click the blue **Publish My Edits** button.

Delete a Block

1. Visit a page on your site and place it in **Edit Mode** by clicking the **Edit button** in the upper left hand corner of your screen.
2. Once the page appears in **Edit Mode**, roll your mouse over a block. Once the block is highlighted in gray, click it once with your left mouse button to display the **Context Menu**.
3. Click the **Delete** command that appears on the **Context Menu**.


PDS
Editing
Dashboard
Intelligent Search
Sign Out
PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
Contact
Edit
Copy to Clipboard
Move
Delete
Design
Custom Template
Set Permissions
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia

4. A window will appear that asks “Do you want to delete this block?” Click **OK** to confirm the deletion.

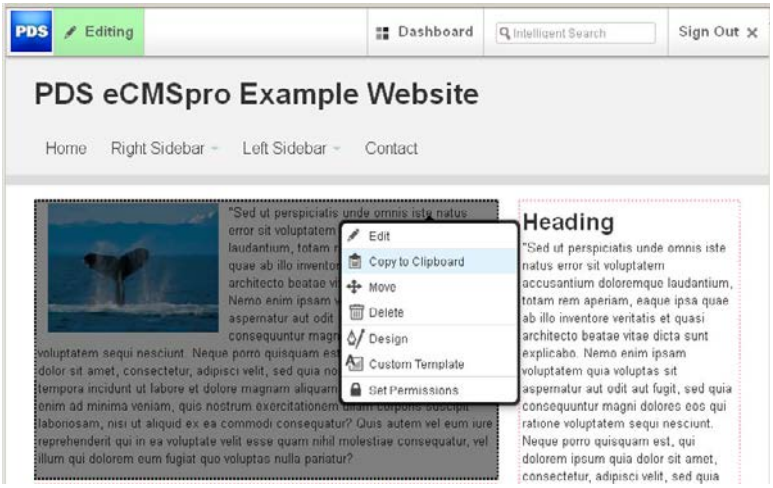

PDS
Editing
Dashboard
Intelligent Search
Sign Out
PDS eCMSpro Example Website
Home
Right Sidebar
Left Sidebar
Contact
Do you want to delete this block?
OK
Cancel
Custom Template
Set Permissions
Heading
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia

5. The page will now appear without the block you deleted.
6. To save this change, click the **Editing Button** in the upper left hand corner of your screen to display the **Editing Menu** then click the blue **Publish My Edits** button.

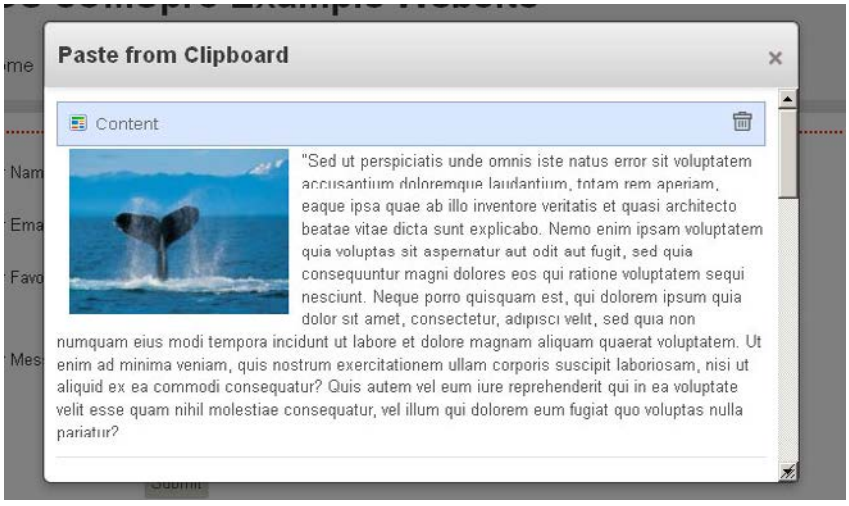
Copy a Block to Another Page

Follow the steps below to copy a block from one page on your site to another page on your site.

1. Visit a page on your site and place it in **Edit Mode** by clicking the **Edit button** in the upper left hand corner of your screen.
2. Once the page appears in **Edit Mode**, roll your mouse over a block. Once the block is highlighted in gray, click it once with your left mouse button to display the **Context Menu**.
3. Click the **Copy to Clipboard** command that appears on the **Context Menu**.



4. Click the **Editing Button** in the upper left hand corner of your screen to display the **Editing Menu** then click the blue **Publish My Edits** button.
5. Visit a different page on your site. Place this page into **Editing Mode** by clicking the **Edit button** in the upper left hand corner of your screen.
6. Locate the **Add to Main** section of the page. Roll your mouse over the **Add to Main** section so that it is highlighted in gray.
7. Click the **Add to Main** section once with your left mouse button to display the **Context Menu**. Click the **Paste from Clipboard** command that appears on the **Context Menu**.



Continued...

8. The **Paste from Clipboard** window will appear. Locate the block that you copied in Step 3 on the **Paste from Clipboard** window. To conserve space, the block that you copied may appear smaller.
9. A label is displayed above the block that you copied in Step 3 that indicates the type of the block, such as **Content** or **Image**. Roll your mouse over this label. The label will become highlighted in blue. Click this label once with your left mouse button.
10. The **Paste from Clipboard** window will disappear and the block that you copied will appear on the page.
11. To save this change, click the **Editing Button** in the upper left hand corner of your screen to display the **Editing Menu** then click the blue **Publish My Edits** button.

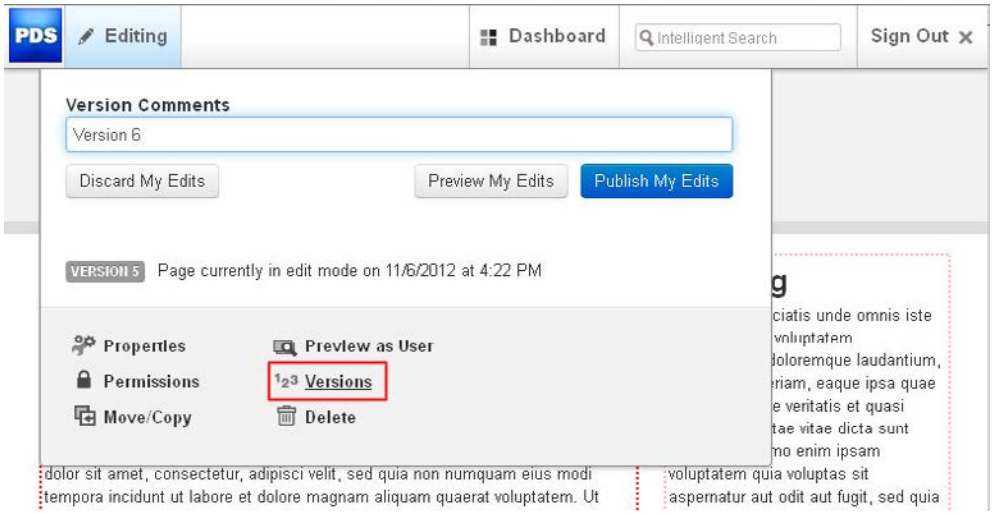
Page Versions

PDS eCMSpro includes a powerful versioning system that stores a new version for each page on your site every time your make an edit. This allows you to easily review the complete history of each page on your site and store drafts that are not visible to the public until you approve them.

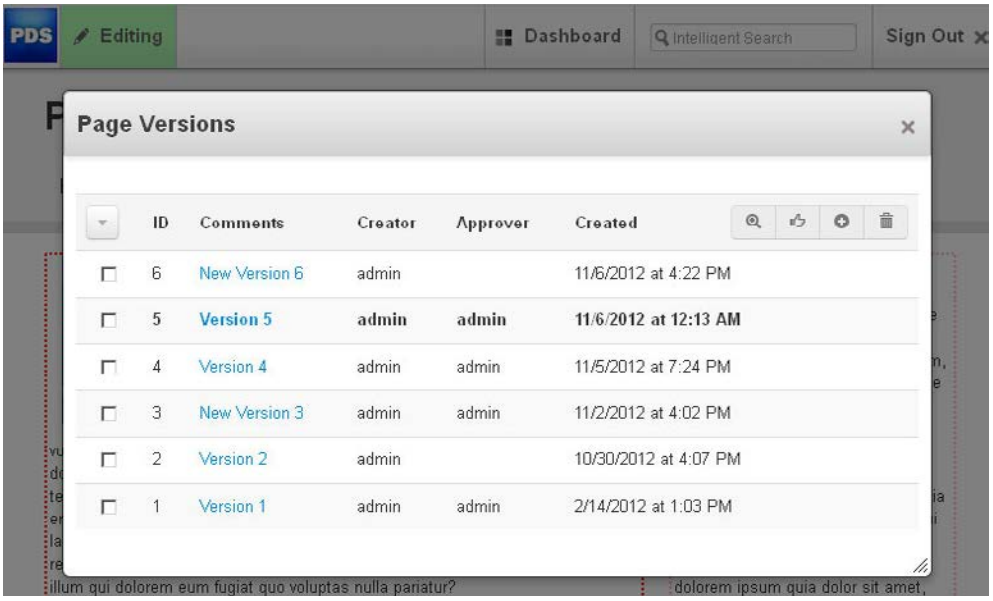
Reviewing Page Versions

Follow the steps below to review the past versions of a page on your site.

1. Visit a page on your site and roll your mouse over the **Edit** button in the left hand corner of the screen to display the **Edit Menu**.
2. Once the **Edit Menu** is visible, click the **Versions** command that appears in the lower section.

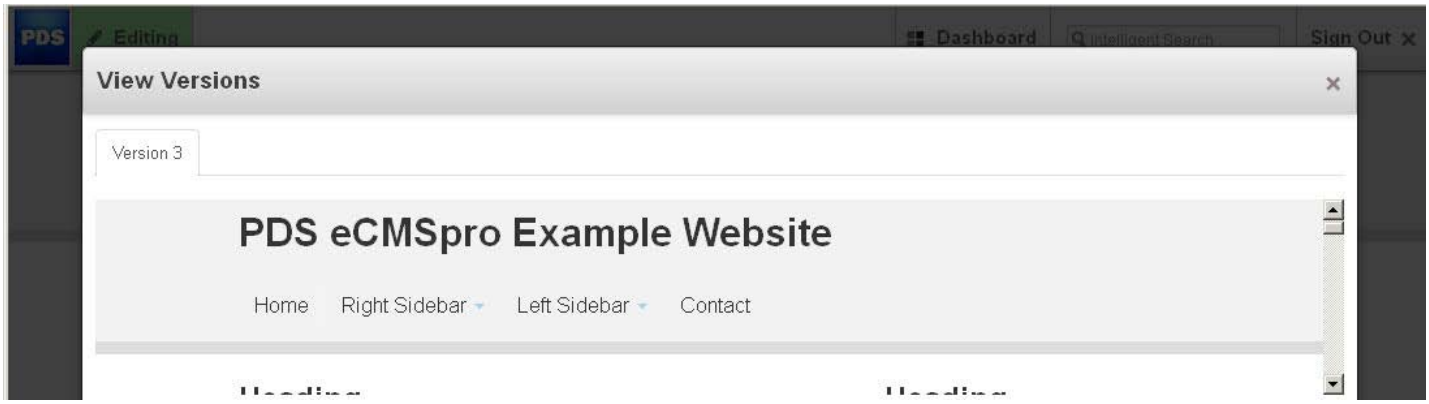


3. The **Page Versions** window will appear. The **Page Versions** window displays a table listing all the past versions of this page. The table lists the current **Approved** version that is available to the public as well as unapproved versions that are not visible to the public. The **Approved** version is listed with bold text.


PDS
Editing
Dashboard
Intelligent Search
Sign Out
Page Versions
ID
Comments
Creator
Approver
Created
6 New Version 6 admin 11/6/2012 at 4:22 PM
5 Version 5 admin admin 11/6/2012 at 12:13 AM
4 Version 4 admin admin 11/5/2012 at 7:24 PM
3 New Version 3 admin admin 11/2/2012 at 4:02 PM
2 Version 2 admin 10/30/2012 at 4:07 PM
1 Version 1 admin admin 2/14/2012 at 1:03 PM

Continued...

4. To preview any version listed on the **Page Versions** window, click the text that appears for that version in the **Comments** column of the table.
5. The **View Versions** window will appear. This window displays the content of the page as it appeard at the date and time the version you clicked on was saved.

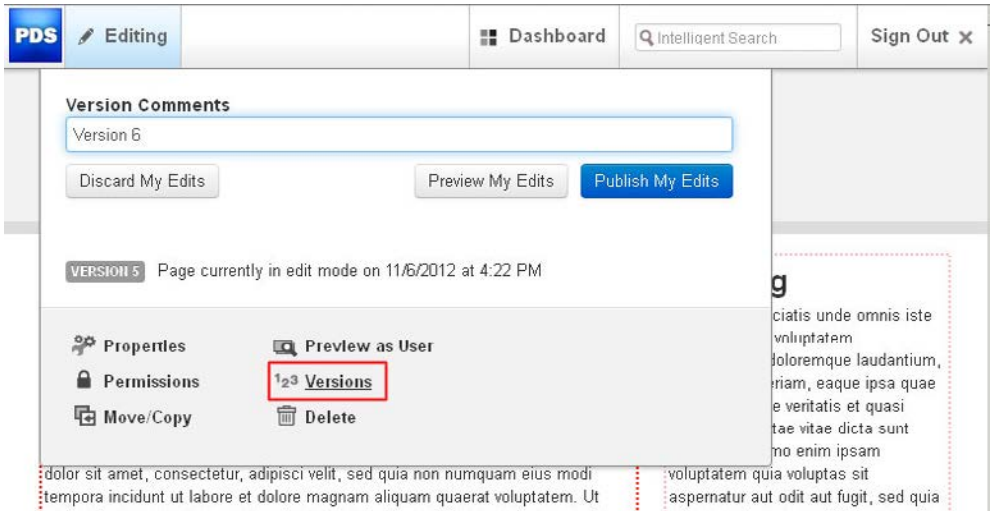


6. Click the **X** in the upper right hand corner of the **View Versions** window. You will be returned to the **Page Versions** window.
7. If you have finished reviewing the versions of this page you can dismiss the **Page Versions** window by clicking the **X** in the upper right and corner of the **Page Versions** window.

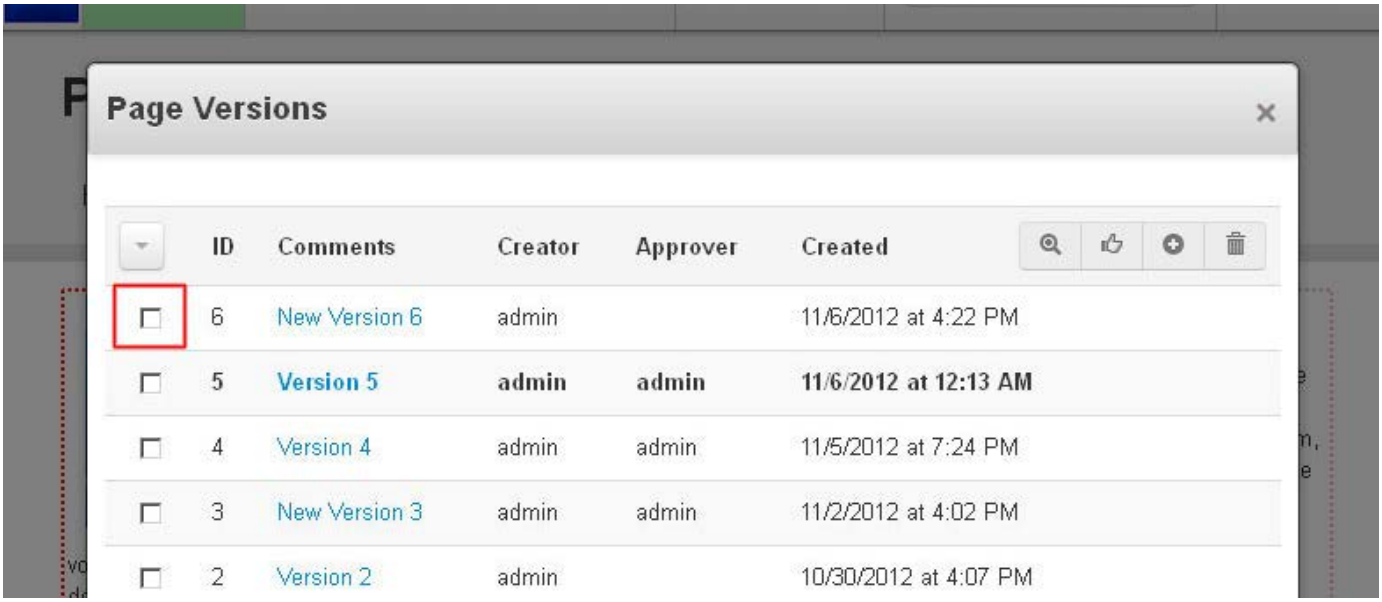
Approving a Page Version

Follow the steps below to replace the current approved version of a page with an unapproved version of that page.

1. Visit a page on your site and roll your mouse over the **Edit** button in the left hand corner of the screen to display the **Edit Menu**.
2. Once the Edit Menu is visible, click the **Versions** command that appears in the lower section.

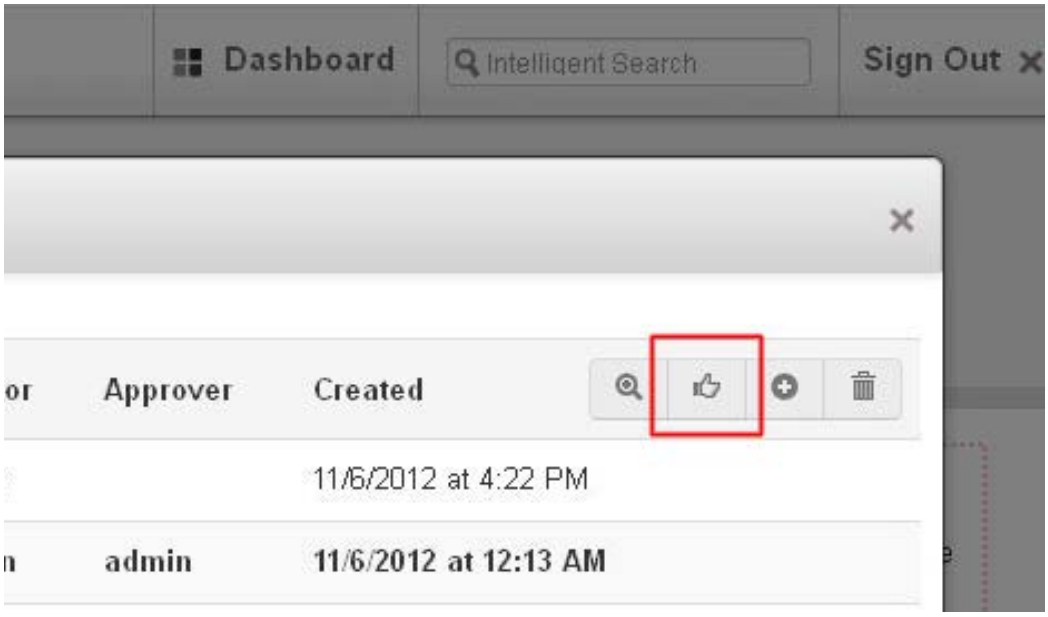


3. The **Page Versions** window will appear. Identify the version that you wish to approve in the listing. Use the steps described in the **Reviewing Page Versions** section to determine which version you wish to approve.
4. Click the **checkbox** that appears on the left hand side of the listing for the version that you wish to approve.

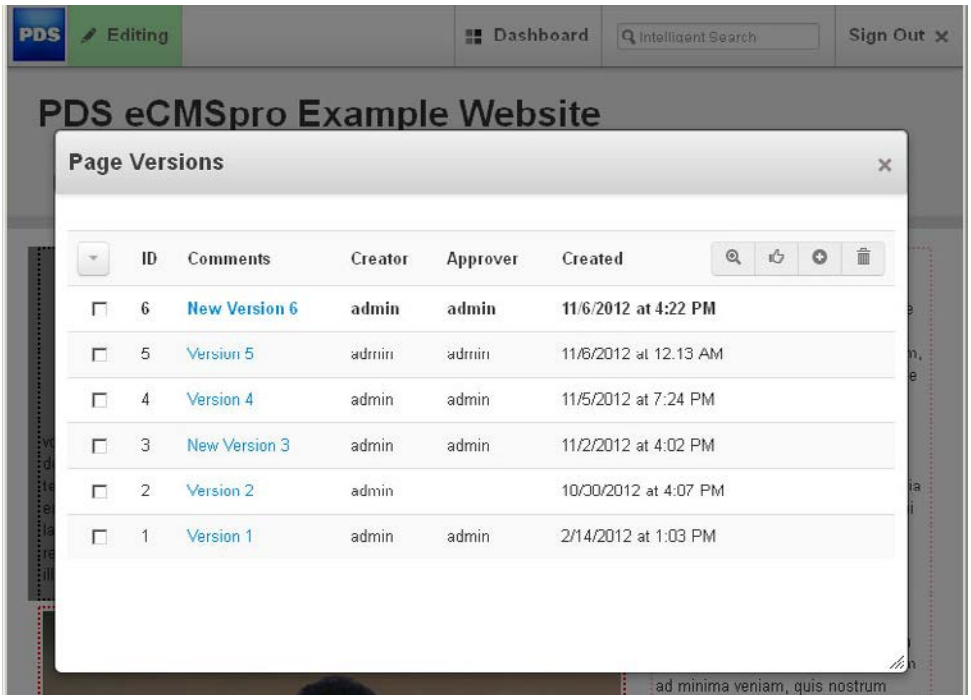


Continued...

5. Locate the **Version Control buttons** that appear in the upper right hand corner of the **Page Versions** window. Click the **Approve** button, which displays a thumbs-up graphic.



5. The listing of versions will change to display the version that you approved in bold text and the other versions in standard text.



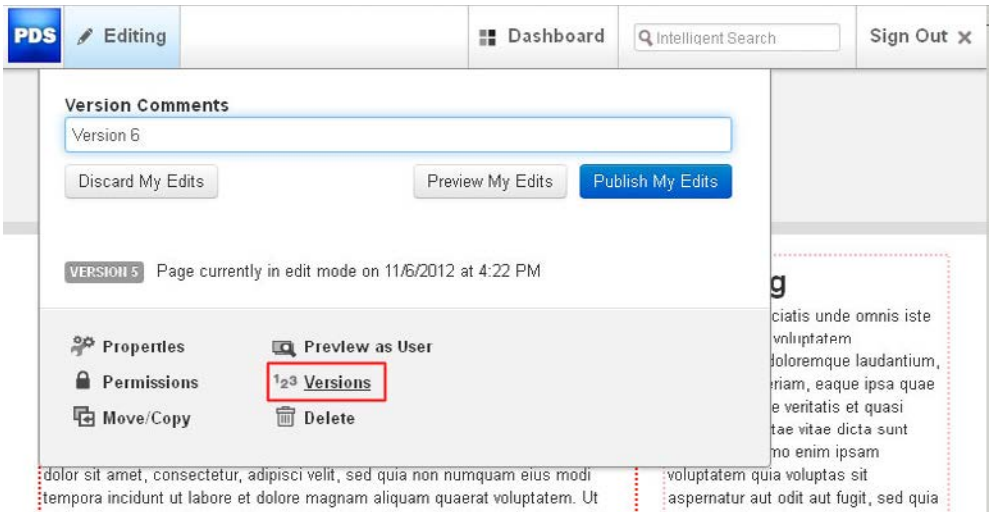
6. Dismiss the **Page Versions** window by clicking the **X** in the upper right and corner of the **Page Versions** window.

Deleting a Page Version

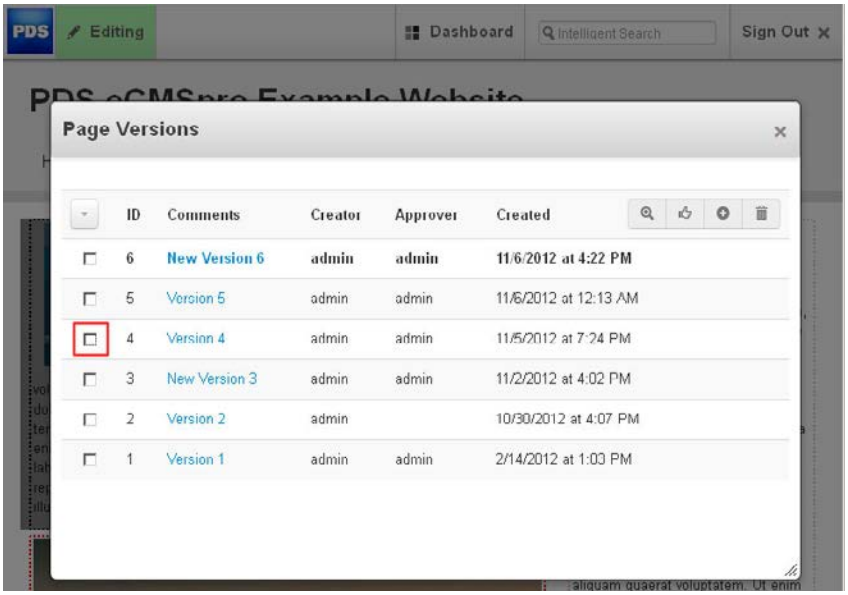
Follow the steps below to replace the current approved version of a page with an unapproved version of that page.

Please Note: Deleting a Page Version is permanent and it is not possible to recover a deleted page version.

1. Visit a page on your site and roll your mouse over the **Edit** button in the left hand corner of the screen to display the **Edit Menu**.
2. Once the **Edit Menu** is visible, click the **Versions** command that appears in the lower section.



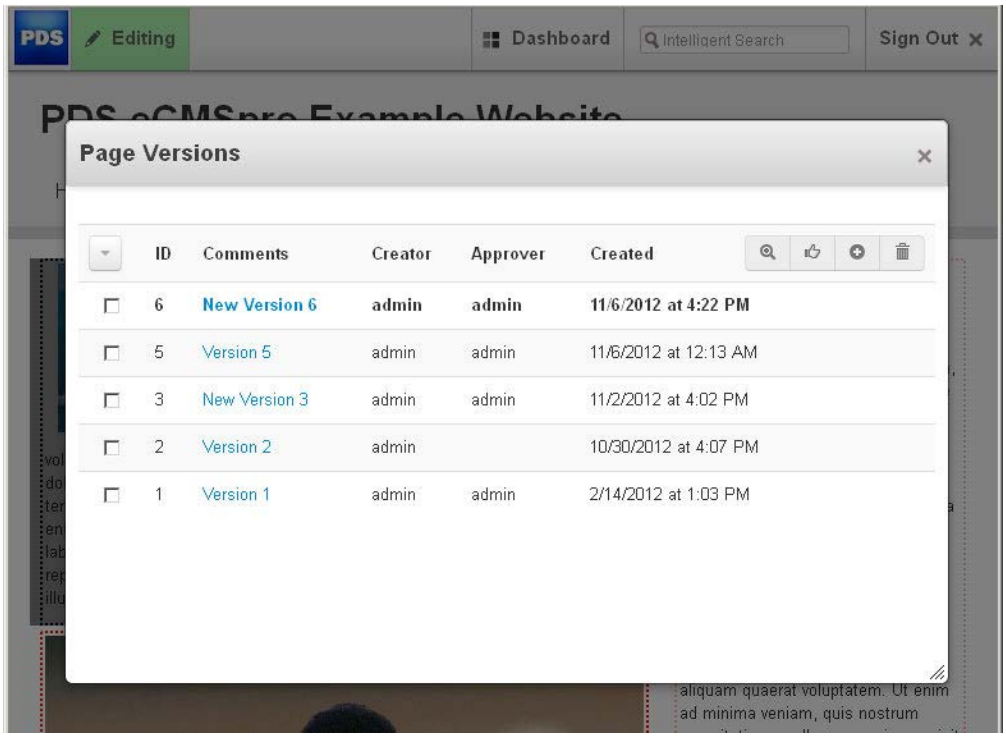
3. The **Page Versions** window will appear. Identify the version that you wish to delete in the listing. Use the steps described in the **Reviewing Page Versions** section to determine which version you wish to delete.
4. Click the **checkbox** that appears on the left hand side of the listing for the version that you wish to delete.


PDS
Editing
Dashboard
Intelligent Search
Sign Out
Page Versions
ID
Comments
Creator
Approver
Created
6 New Version 6 admin admin 11/6/2012 at 4:22 PM
5 Version 5 admin admin 11/6/2012 at 12:13 AM
4 Version 4 admin admin 11/5/2012 at 7:24 PM
3 New Version 3 admin admin 11/2/2012 at 4:02 PM
2 Version 2 admin 10/30/2012 at 4:07 PM
1 Version 1 admin admin 2/14/2012 at 1:03 PM

Continued...

5. Locate the **Version Control buttons** that appear in the upper right hand corner of the **Page Versions** window. Click the **Delete** button, which displays a trash can graphic. **Note: You cannot delete the current approved version. If you wish to delete the current approved version you must first approve a different version.**

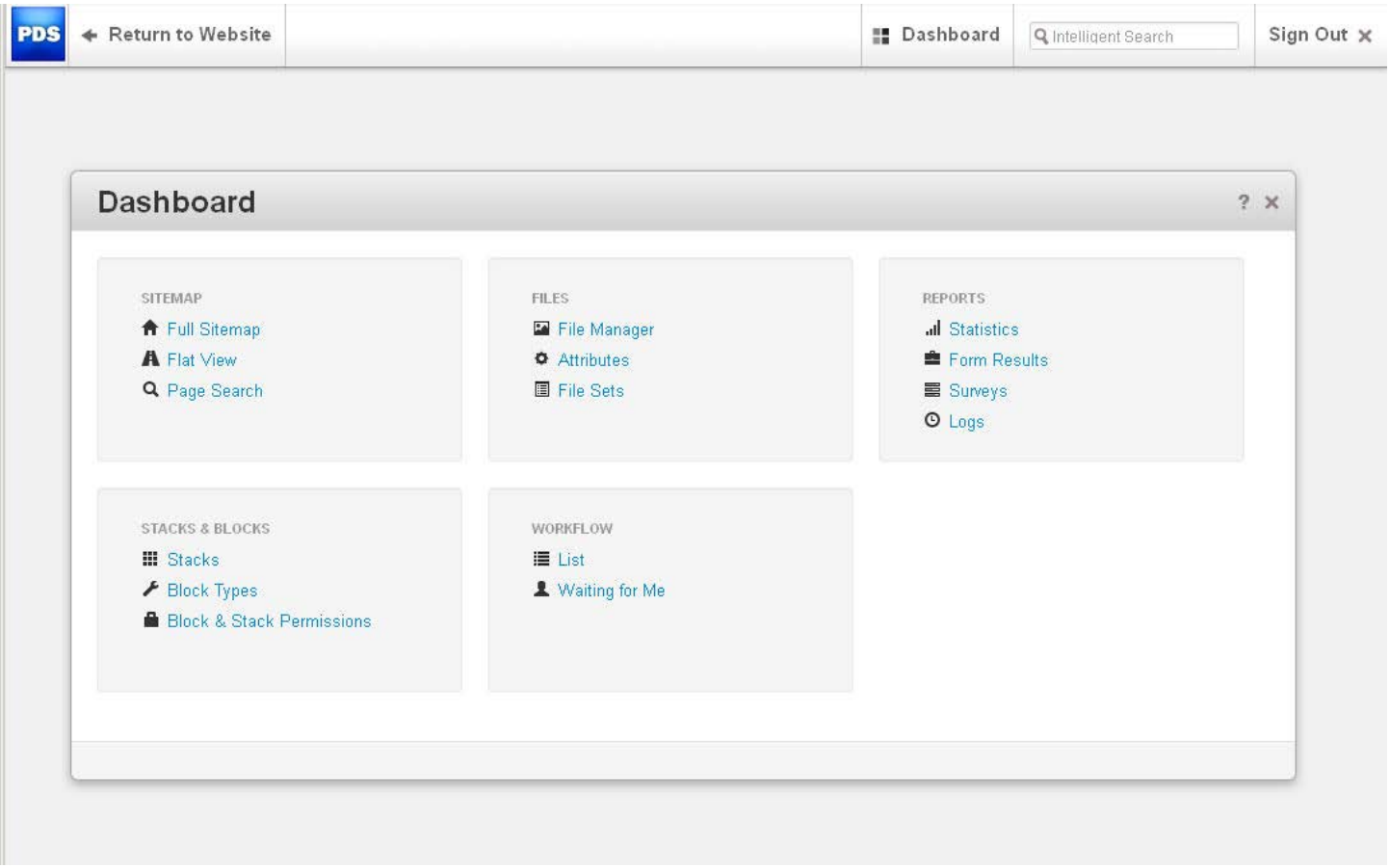
6. The listing of versions will change to display remaining version.



7. Dismiss the **Page Versions** window by clicking the **X** in the upper right and corner of the **Page Versions** window.

Dashboard

Most of the edits you make to your PDS eCMSpro website are performed by visiting the page you wish to adjust and then placing that page into **Editing** mode by clicking the **Edit** button that appears on the PDS eCMSpro toolbar. To make certain edits, such as adding new page or changing the location of a page within your site, you must first visit the PDS eCMSpro **Dashboard**. You can visit the **Dashboard** at any time by clicking the **Dashboard** button that appears on the right hand side of the PDS eCMSpro toolbar.



Dashboard File Manager

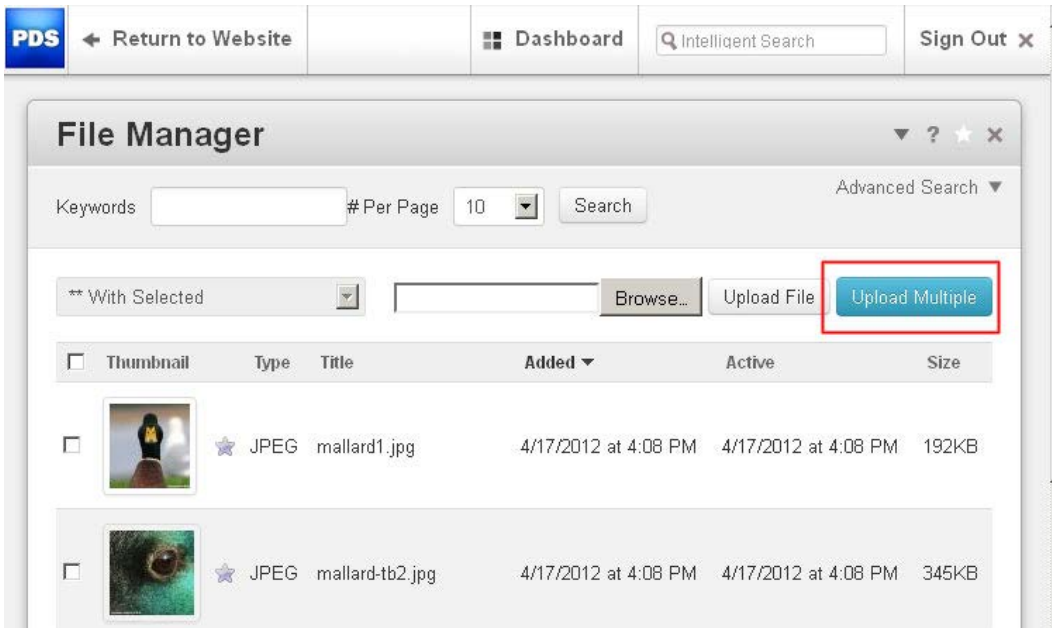
The **Dashboard File Manger** allows you to easily review all the photos, PDF files and other documents that have been uploaded to your site. The **Dashboard File Manager** is the same **File Manager** window that appears when you insert an image or PDF link to a **Content Block**, however it is accessed by first visiting the **Dashboard** rather than by visiting a public page and placing that page into **Editing Mode**.

Visiting the Dashboard File Manager

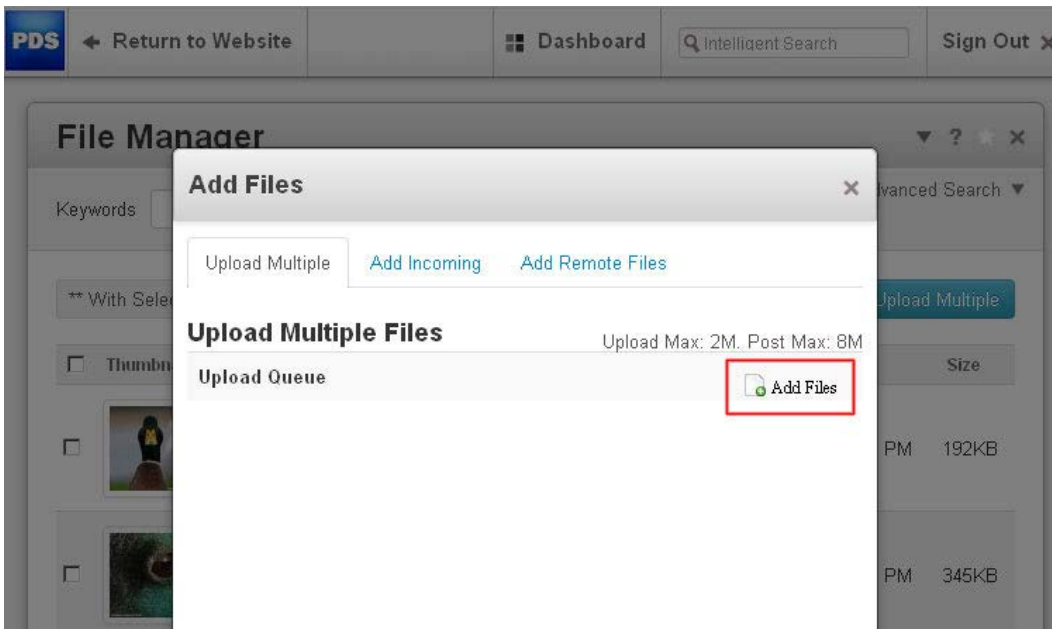
1. Display the **Dashboard** by clicking the **Dashboard** button in the upper right hand corner of your screen.
2. Locate the **Files** section of the **Dashboard**. Click the **File Manager** link that appears in the **File** section. The **File Manager** window will appear.

Uploading Multiple Files

1. Visit the **Dashboard File Manager**.
2. Locate the blue **Upload Multiple** button that appears in the upper right hand corner of the **File Manager** window. Click the **Upload Multiple** button.

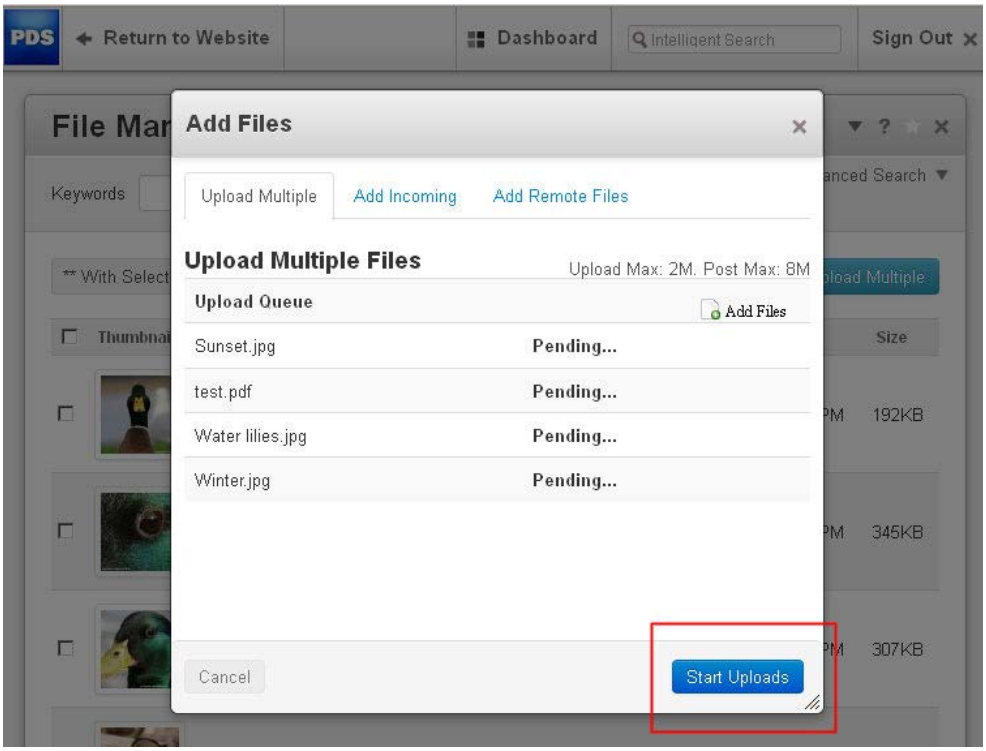


3. The **Add Files** window will appear. The **Add Files** window will display the **Upload Multiple Files** section.
4. Locate the **Add Files** command that appears in the **Upload Multiple Files** section of the **Add Files** window. Click the **Add Files** command.

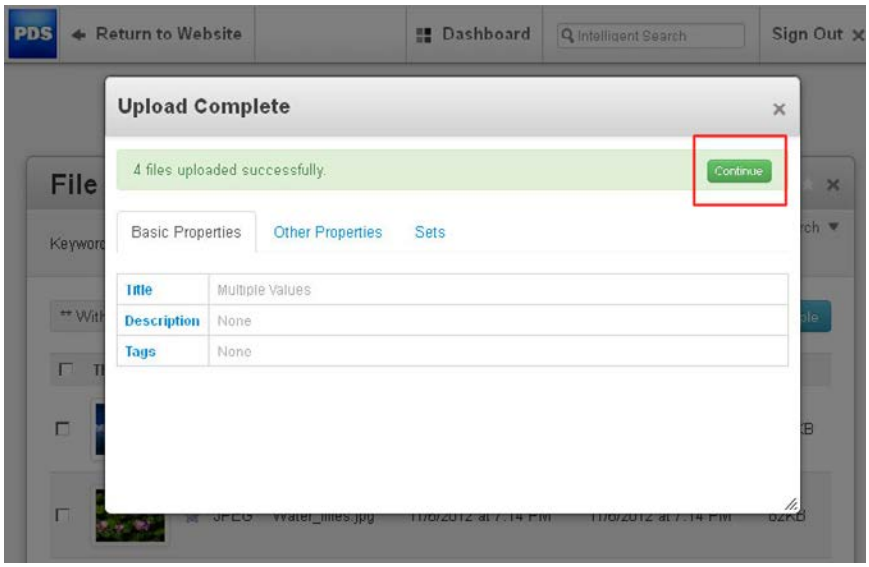


Continued...

5. A window will appears that allows you select files from your computer to upload to your website. Open the folder on your computer that contains the files you wish to upload. Click the first file once with your left mouse button. Hold the shift key on your keyboard and then click the last file you wish to upload. All the files between the two files that you clicked should be highlighted.
6. Click the open button. You will be returned to the **Add Files** window. The **Add Files** window will now list the files that you selected in Step 5.

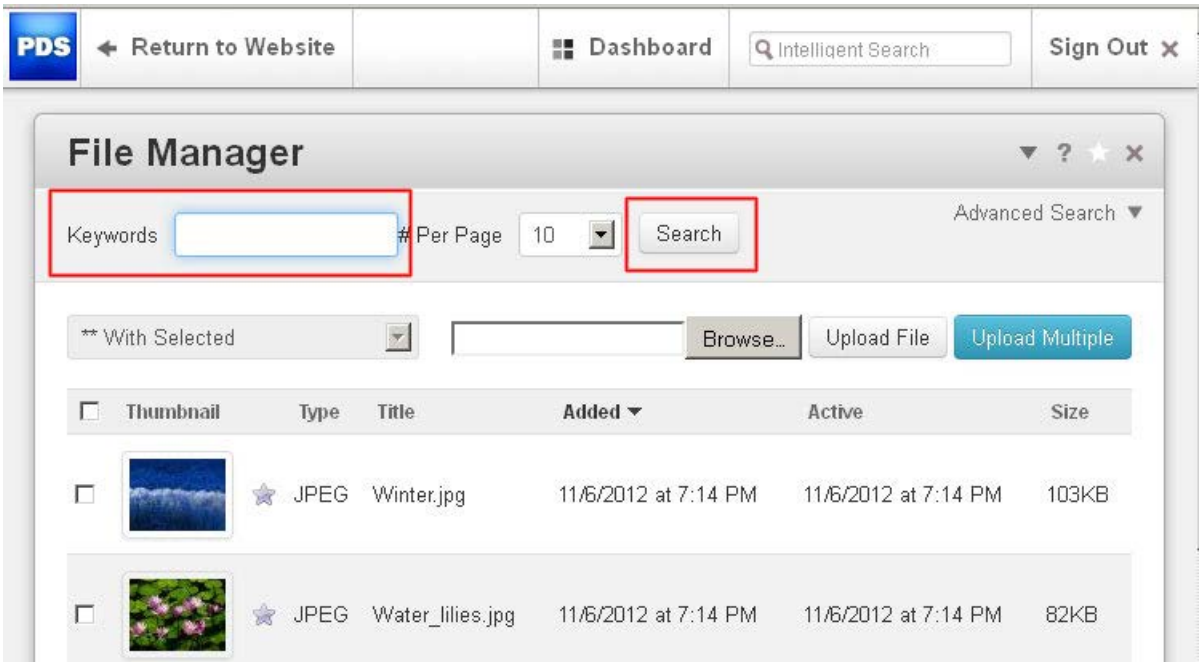


7. Click the blue **Start Uploads** button that appears in the lower left hand corner of the **Add Files** window. An animated progress bar will appear for each file as it is uploaded to your site.
8. The **Upload Complete** screen will appear. Click the green **Continue** button to dismiss the **Upload Complete** screen.



Searching the File Manager

1. Visit the **Dashboard File Manager**.
2. Locate the **Keywords** field in the upper right hand corner of the **File Manager** window. Type in part of the name of the file you are looking for.
3. Click the **Search** button that appears to the right of the **Keywords** field. The **File Manager** listing will be filtered to display files that match the text you typed into the **Keywords** field.



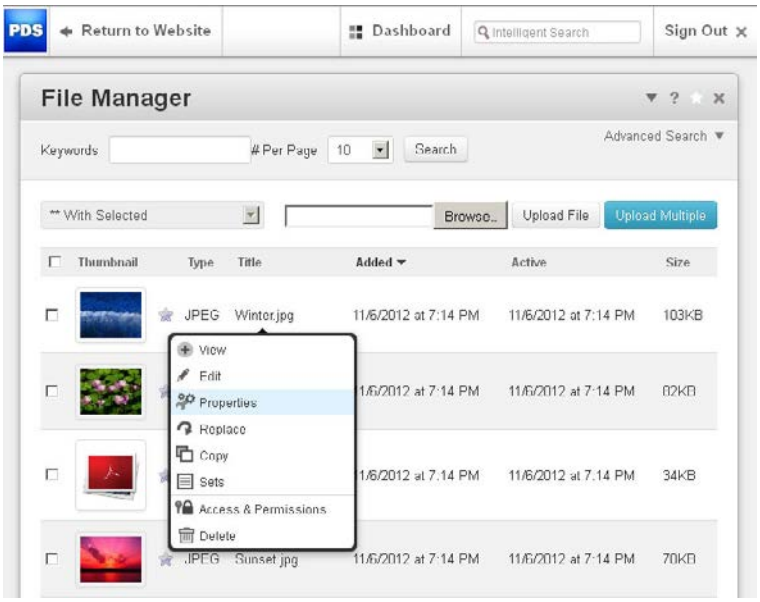
Tips for Searching the File Manager

- If you are looking for an image, try searching common image file types such as **jpg**, **jpeg**, **gif** or **png** as keywords.
- If you are looking for a document, try using common document file type such as **doc**, **pdf** or **xls** as keywords
- You can adjust the number of files that are displayed by the **File Manger** by changing the **# Per Page** option that appears to the right of the **Keywords** field and then clicking the **Search** button.
- The columns of the file listing are sortable:
    - Click the column heading **Added** to sort the files in the **File Manger** listing by the date that they were uploaded to your site.
    - Click the **Size** column heading to sort the files by their sizes.
    - Click the **Type** column heading to sort the files by their types
- Clicking any column heading a second time will reverse the order of the sort.

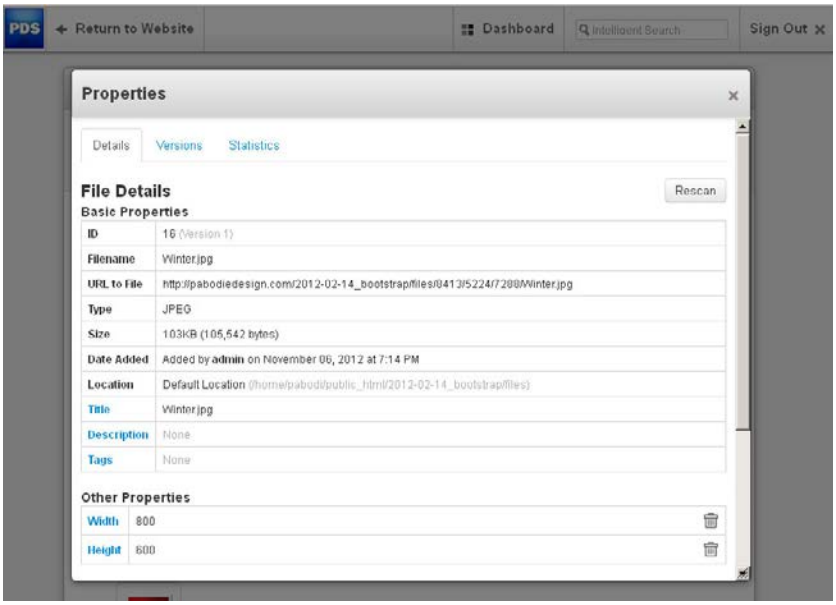
Review File Information

PDS eCMSpro stores information for each file that is uploaded to your site. This information includes the name of the user that uploaded the file, the date and time that the file was uploaded, width and height dimensions for image files and other potentially useful data. Follow the steps below to view this information for a file that has been uploaded to your site.

1. Visit the **Dashboard File Manager**.
2. Click the name of a file to display the **File Context Menu**.
3. Click the **Properties** command that is displayed on the **File Context Menu**.



4. The **Properties** window will appear. You can now review the information that PDS eCMSpro has stored for this file.



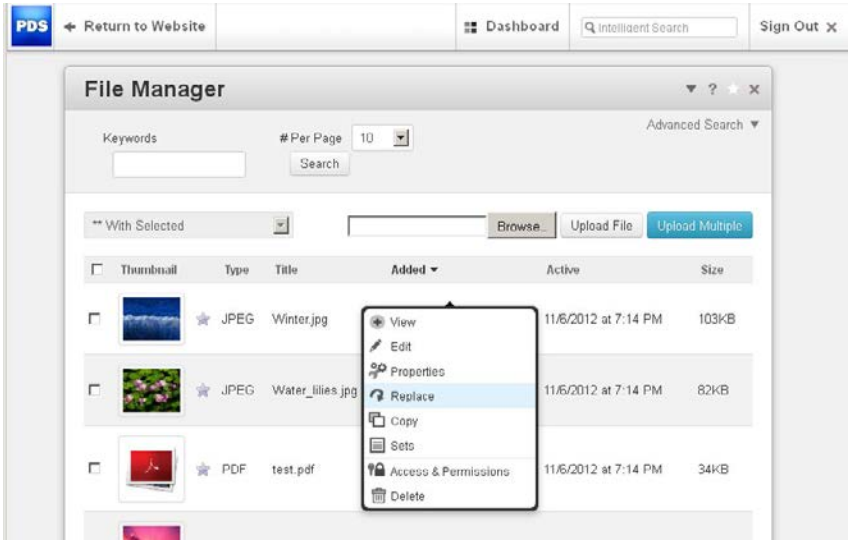
5. When you have finished reviewing this information, dismiss the **Properties** window by clicking the **X** in the upper right hand corner of the Properties window.

Replace a File in the File Manager

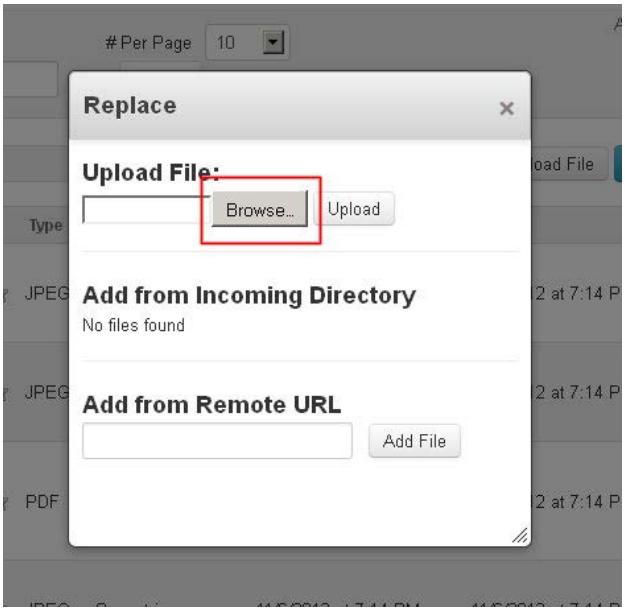
PDS eCMSpro allows you to update any file that has previously been uploaded to your site with a new version. This is useful for PDF or image files that appear on many pages of your site. If you were to upload a new file intended to replace an existing file you would also need to update all the links to the existing file. By using the **Replace** command you can simply replace the existing file and all the links to that file will be automatically updated for you.

Follow the steps below to Replace a file:

1. Visit the **Dashboard File Manager**.
2. Click the name of a file to display the **File Context Menu**.
3. Click the **Replace** command that is displayed on the **File Context Menu**.



4. The **Replace** window will appear. Click the **Browse** button.



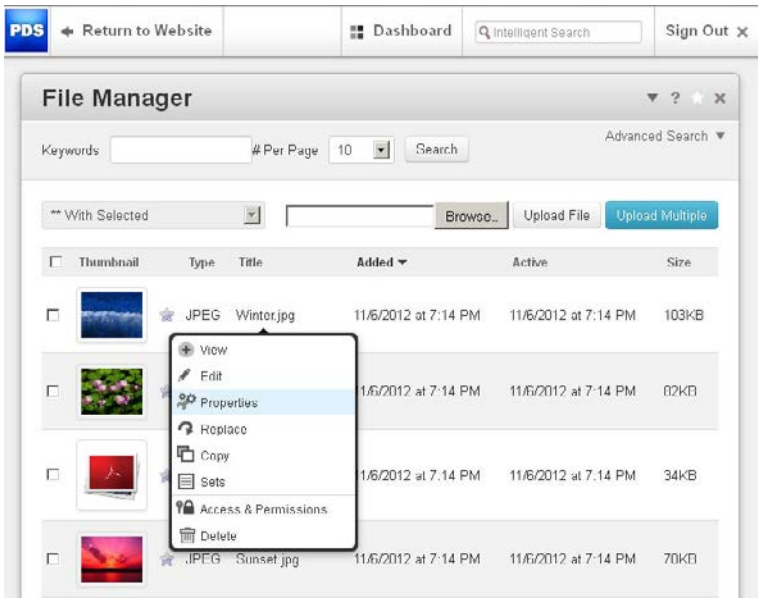
Continued...

5. A **File Selection** window will appear that allows you to select the file on your computer you wish to replace the existing file on your website with.
6. Locate the file you wish to upload and click it once with your left mouse button then click the **Open** button that appears on the **File Selection** window.
7. The file selection window will disappear and you will be returned to the **Replace** window. Click the **Upload** button that appears to the right of the **Browse** button.
8. The file that you selected will replace the existing file on your website and the **Upload Complete** window will appear. Click the green **Continue** button to dismiss the **Upload Complete** button.

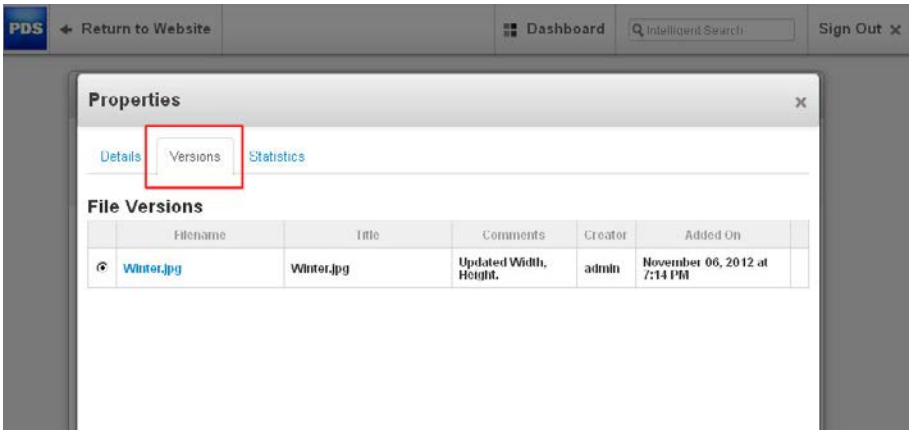
Review File Versions

Each time you Replace a file using the File Manager you create a new version of that file. Follow the steps below to review past versions of a file that has been replaced:

1. Visit the **Dashboard File Manager**.
2. Click the name of a file to display the **File Context Menu**.
3. Click the **Properties** command that is displayed on the **File Context Menu**.



4. The **Properties** window will appear. Click the **Versions** tab that appears on the **Properties** window.
5. The **File Versions** tab will appear. The **File Versions** tab displays a listing of each version of the file and includes the date and time that version was uploaded to your site.



6. To download any version, click the filename of that version that appears in the **Filename** column of the **File Versions** tab.
7. When you have finished reviewing file versions, click the **X** in the upper right hand corner of the **Properties** window dismiss the **Properties** window.

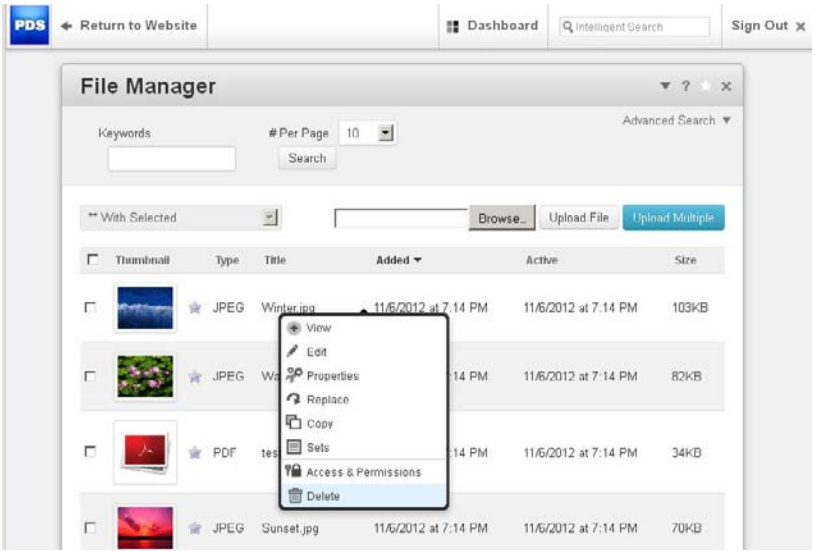
Delete a File with the File Manager

You can use the **File Manager** to delete files from your site.

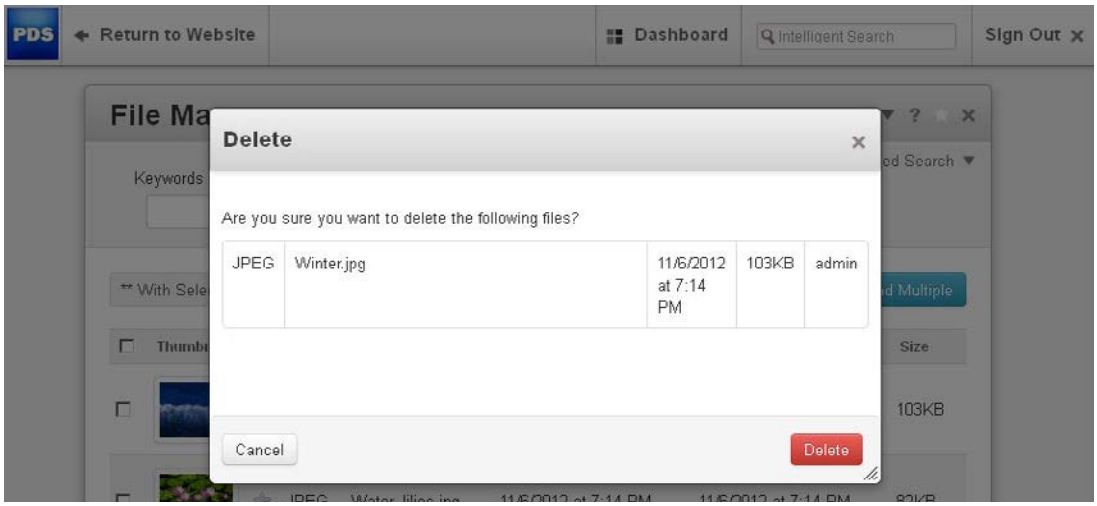
Please Note:

- When a file is deleted from your site any links to that file that you have created will be broken. Visitors that click these links will receive an error and you should remove or adjust these links to prevent this.
- Once a file is deleted it is permanently removed from your website and cannot be recovered.

1. Visit the **Dashboard File Manager**.
2. Click the name of a file to display the **File Context Menu**.
3. Click the **Delete** command that appears at the bottom of the **File Context Menu**.



4. The **Delete** window will appear with the text “Are you sure you want to delete the following files?” Click the red **Delete** button in the lower right hand corner of the **Delete** window to confirm the deletion.



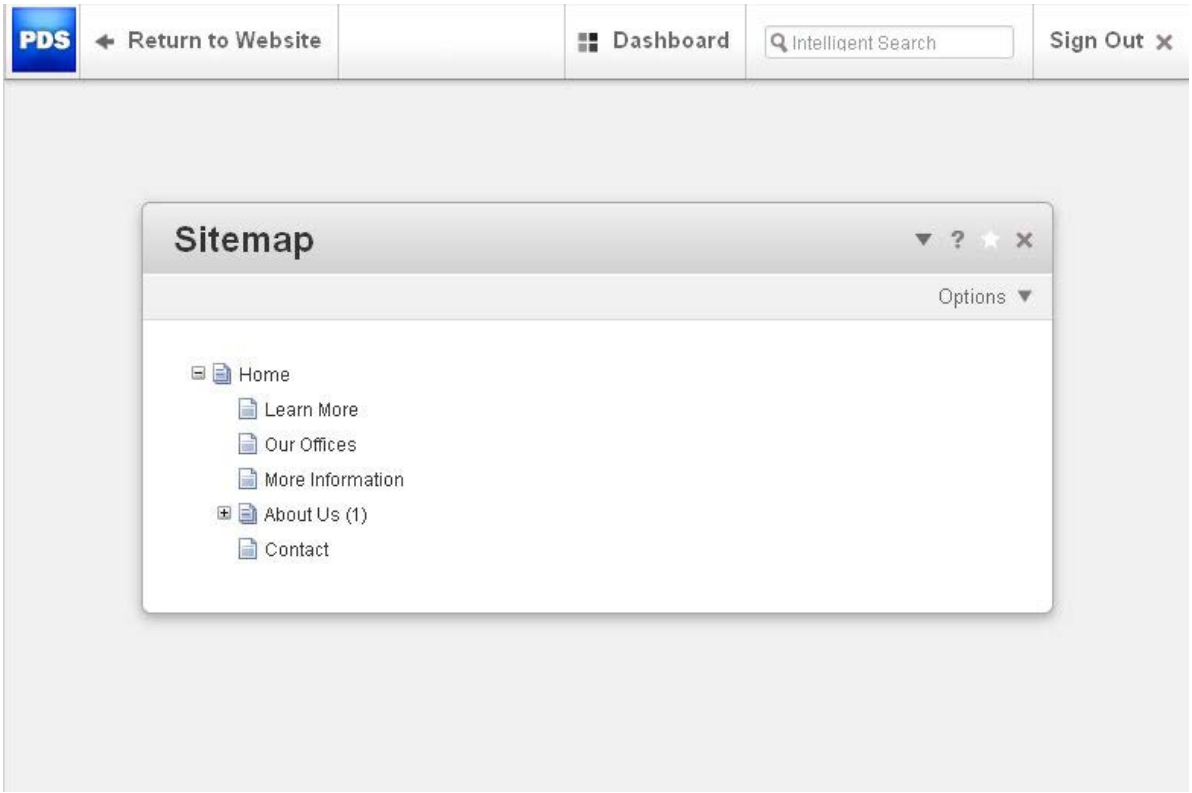
5. You will be returned to the **File Manager** window.

Sitemap

The Sitemap displays a nested tree that lists all the pages on your site. The top level of the tree corresponds to the public navigation menu of your site. You can use the Sitemap to add new pages to your site, delete pages and change the location of pages.

Visiting the Sitemap

1. Display the **Dashboard** by clicking the **Dashboard** button that appears on the right hand side of the PDS eCMSpro toolbar.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link. The **Sitemap** window will appear.

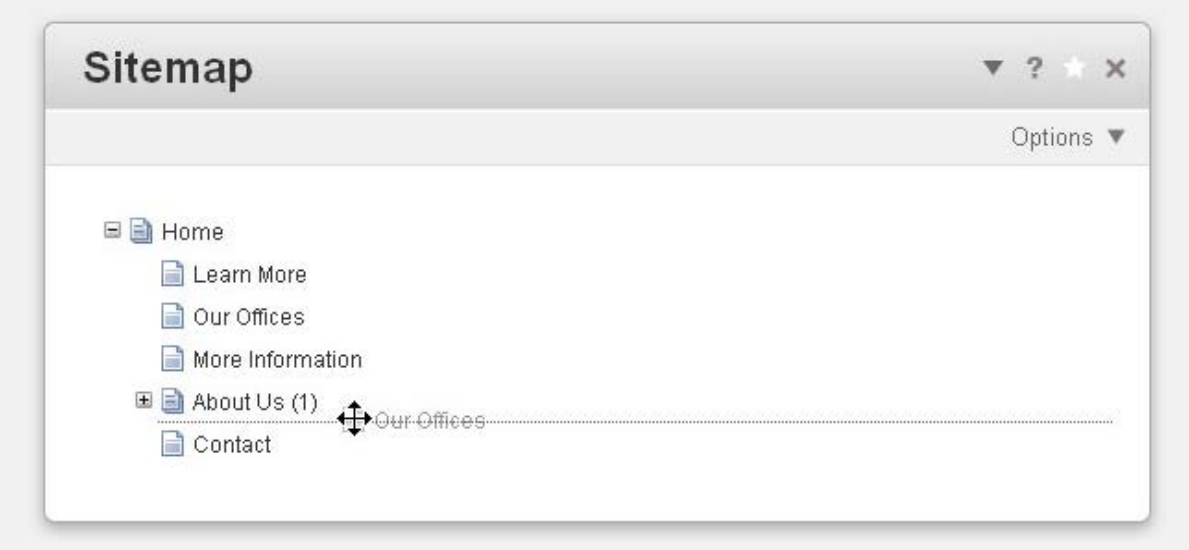


Change the Location of a Page on your Site

The Sitemap can be used to change the location of a page on your site. This is useful for changing the order of pages as they appear on the public navigation menu of your site.

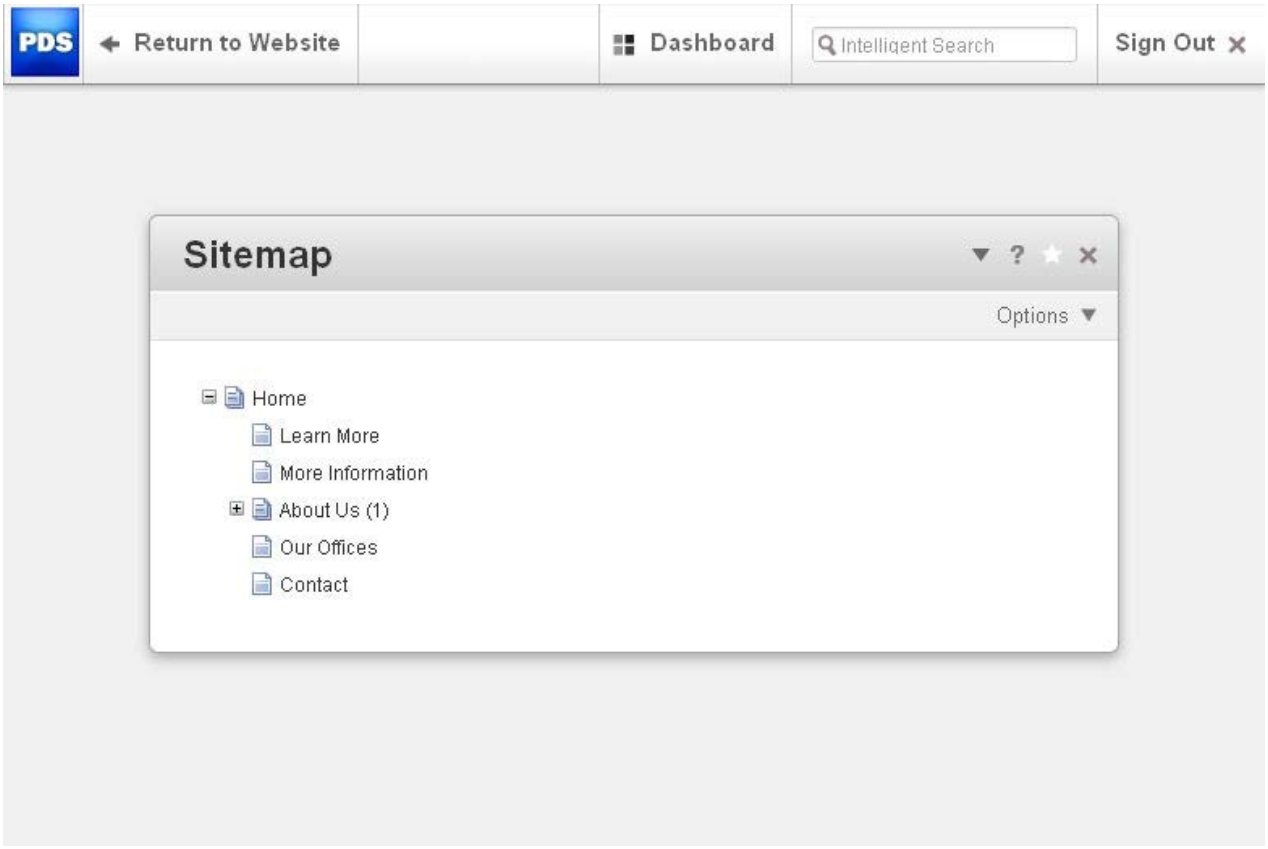
1. Visit the **Sitemap**.
2. Identify the page you wish to relocate. Roll your mouse over the white paper icon that appears to the left of the name of the page you wish to relocate. Your cursor will change from a white pointer to a four-way arrow.

3. Click and hold the white page icon with your left mouse button
4. While continuing to hold your left mouse button, slowly drag the page up or down the sitemap to change it's location.
5. As you drag the page you will notice a thin dashed line appear between the other pages in the sitemap listing. This thin dashed line represents the location that the page you are dragging will be relocated.



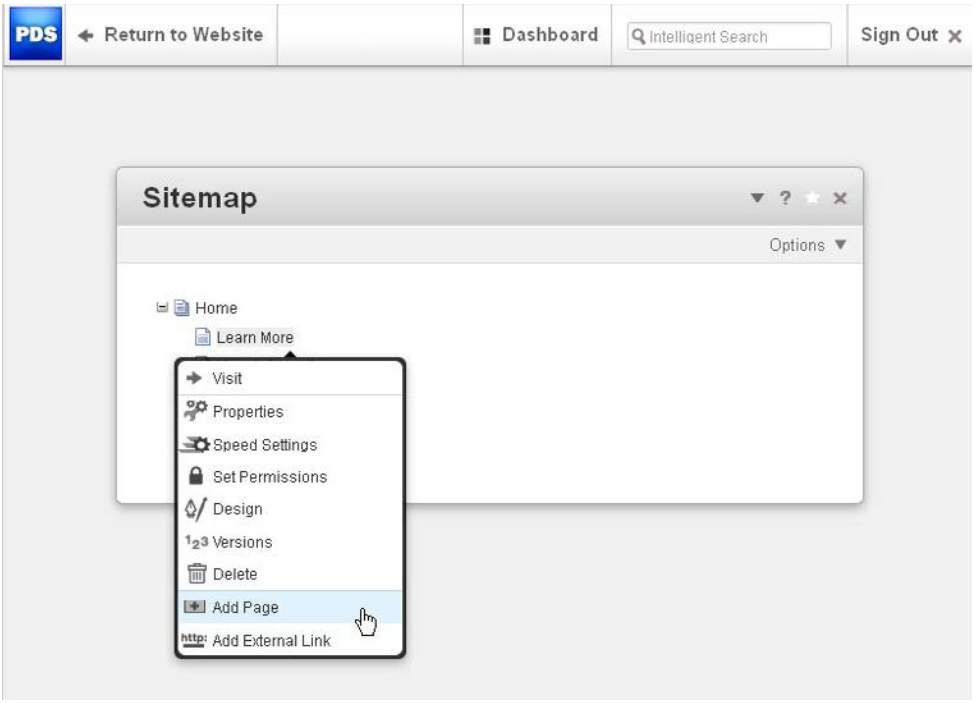
Continued...

7. When the thin dashed line appears in the position that you would like to relocate the page, release your left mouse button.
8. The **Sitemap** listing will adjust to display the page in it's new location. If the page you moved appears on the public navigation menu of your site, it's location on the public navigation menu will also be adjusted.

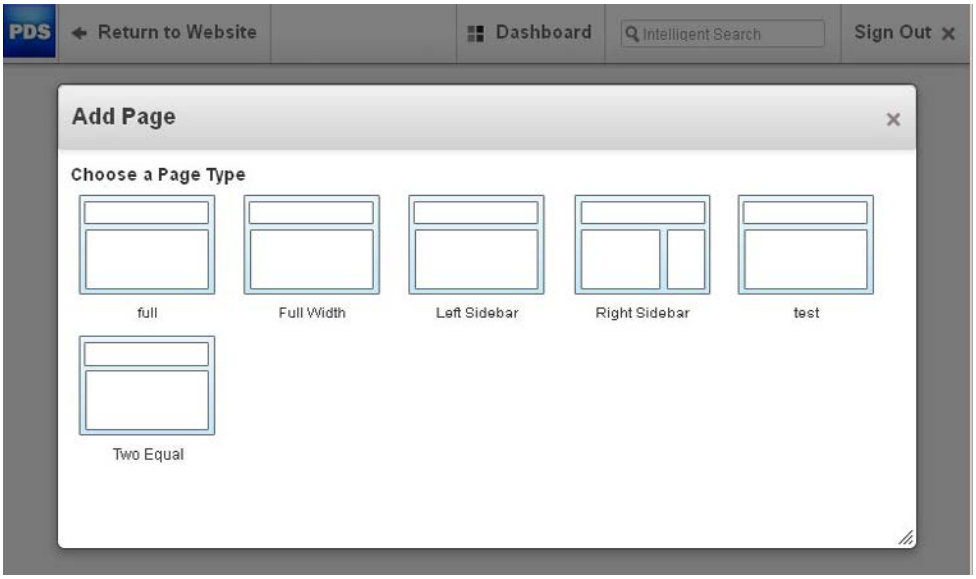


Adding a New Page

1. Visit the **Sitemap**.
2. Locate the page in the **Sitemap** listing beneath which you would like to add a new page.
3. Click the name of the page beneath which you would like to add a new page once with your left mouse button to display the **Context Menu**.
4. Click the **Add Page** command on the **Context Menu**.

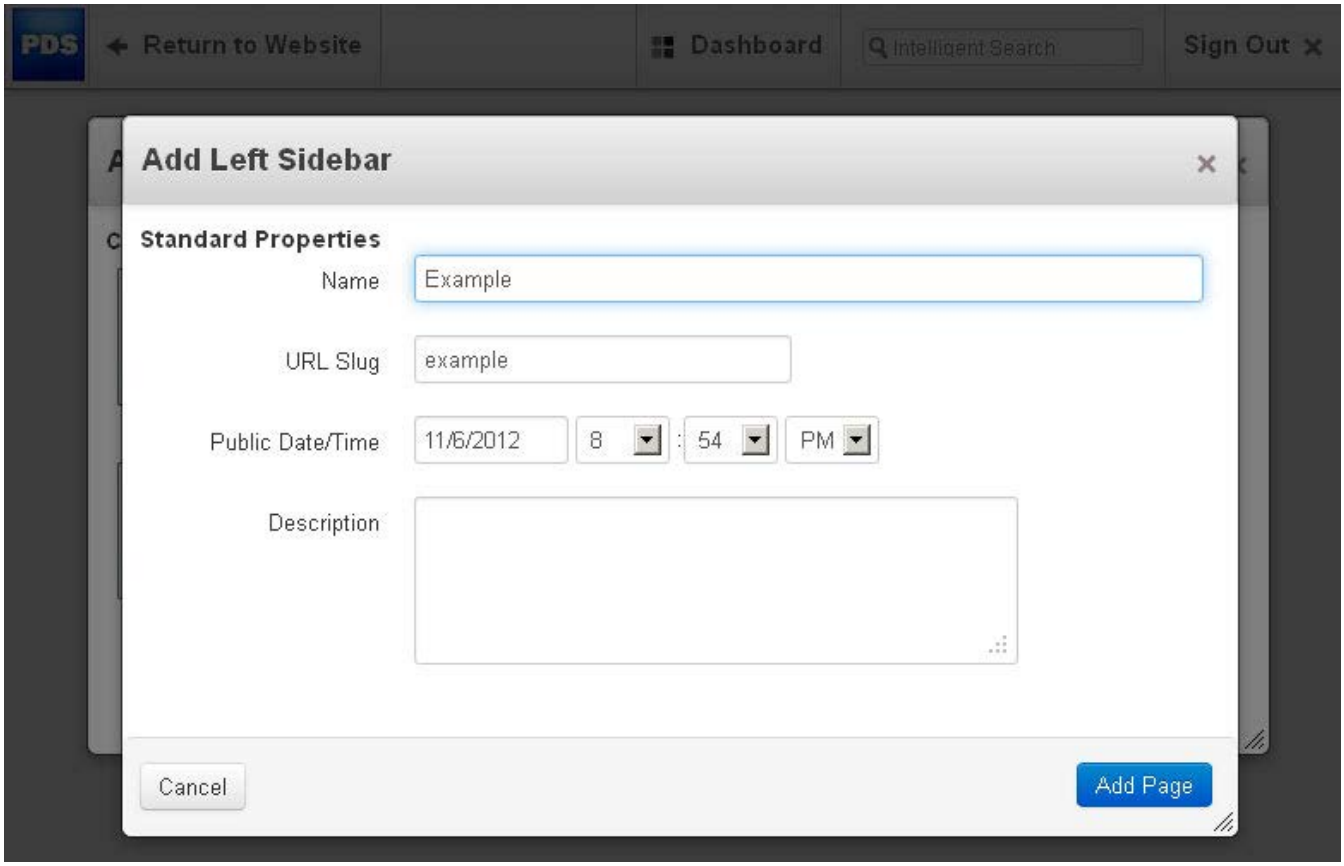


5. Choose the **Page Type** of the page you would like to add. Depending upon the nature of your site you may have a single **Page Type** available or several **Page Types** to choose from. The **Page Types** will be named to help you select the appropriate type.



Continued...

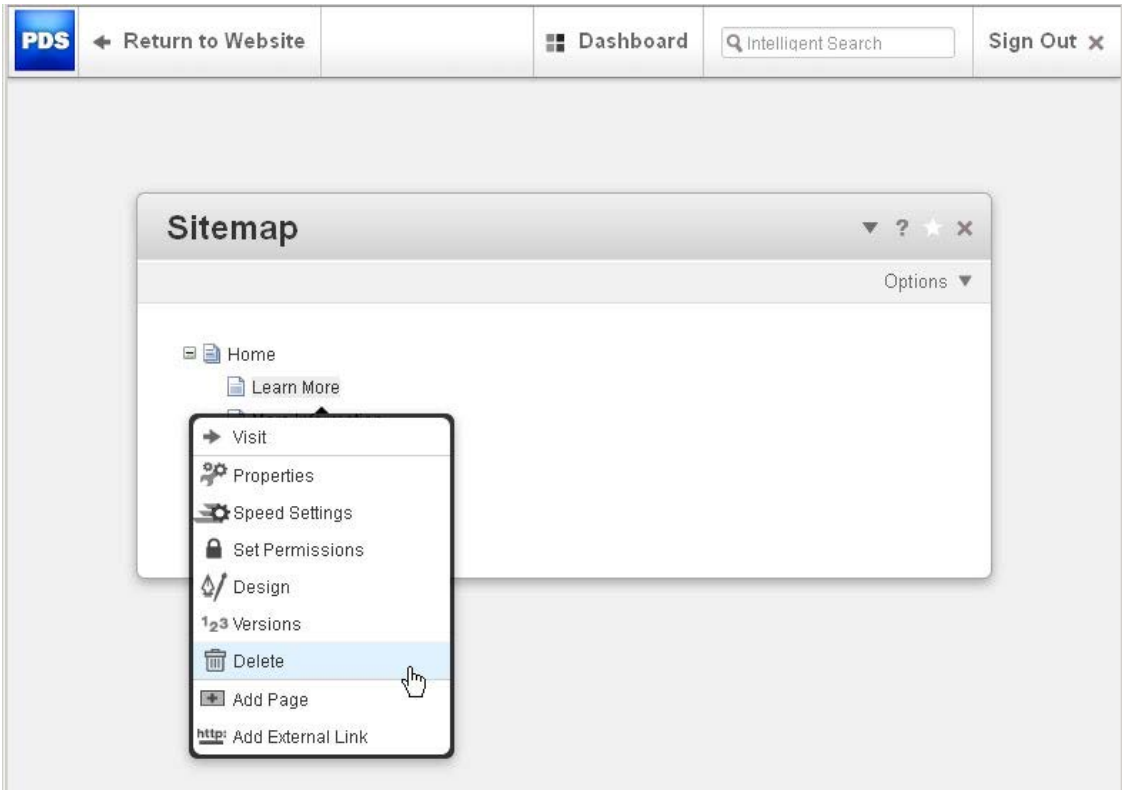
6. The **Standard Properties** section will appear. Enter a name for the page in the **Name** field.



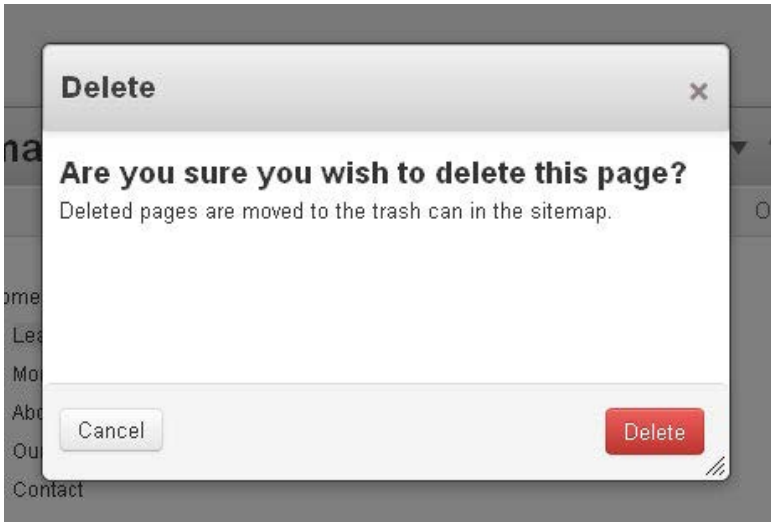
7. Click the blue **Add Page** button that appears in the lower right hand corner of the **Standard Properties** section.
8. The **Add Page** window will disappear and you will be returned to the **Sitemap**.
9. Visit the new page that you created and add Blocks to display your content.

Delete a Page

1. Visit the **Sitemap**.
2. Locate the page in the **Sitemap** that you wish to delete.
3. Click the name of the page in the **Sitemap** that you wish to delete and click it once with your left mouse button to display the **Context Menu**.



4. Click the **Delete** command that appears on the **Context Menu**.
5. The **Delete** window will appear with the text “Are you sure you wish to delete this page?

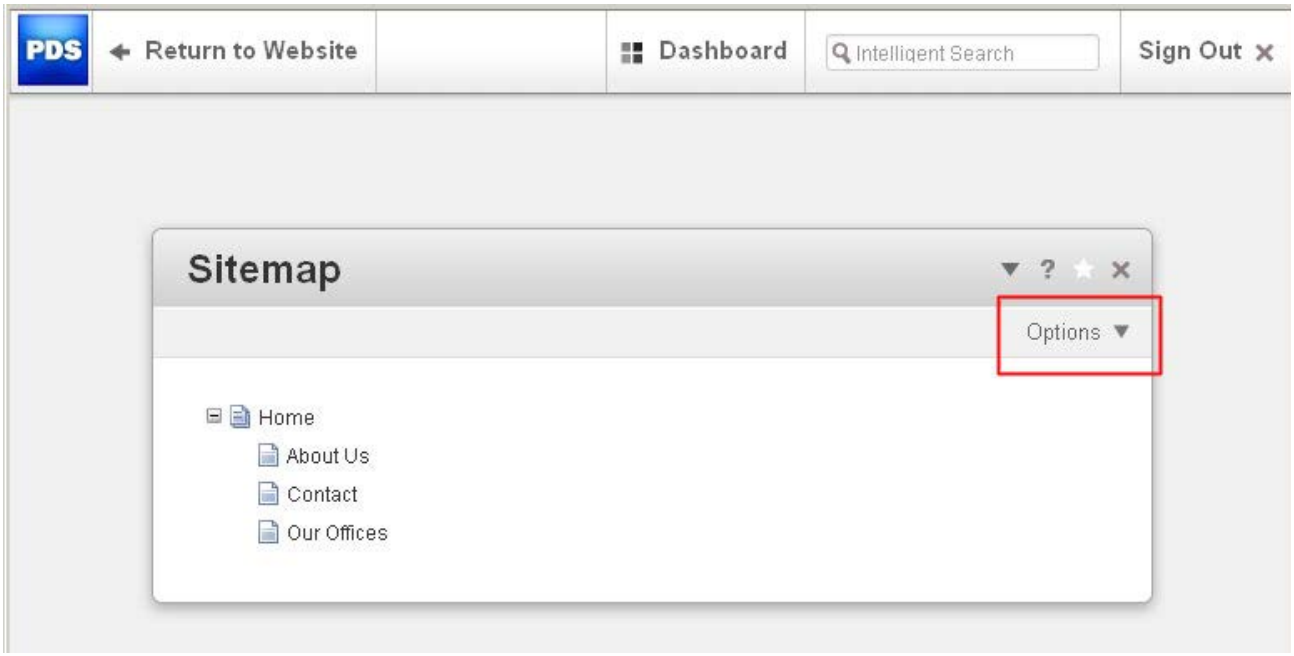


6. Click the red **Delete** button in the lower right hand corner of the **Delete** window.
7. You will be returned to the **Sitemap** and the listing will be updated to remove the page that you deleted.

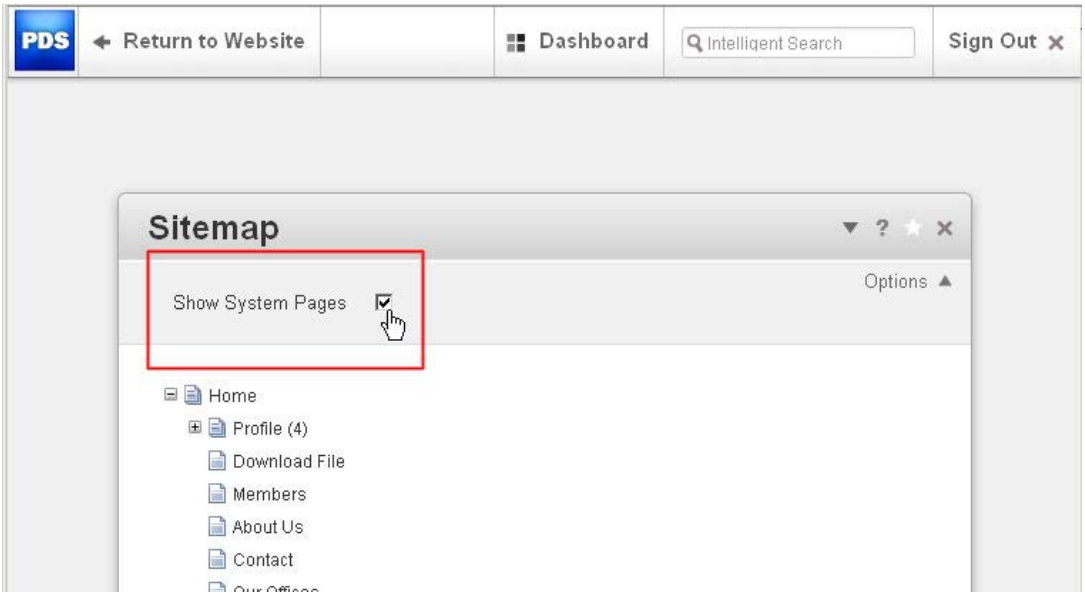
Restore a Deleted Page from the Trash

Recent versions of PDS eCMSpro include a Trash feature that stores pages that have been deleted from your site. If your website includes the Trash feature you can recover pages from the Trash by following the steps below:

1. Visit the **Sitemap**.
2. Click the **Options** link in the upper right hand corner of the **Sitemap** window.

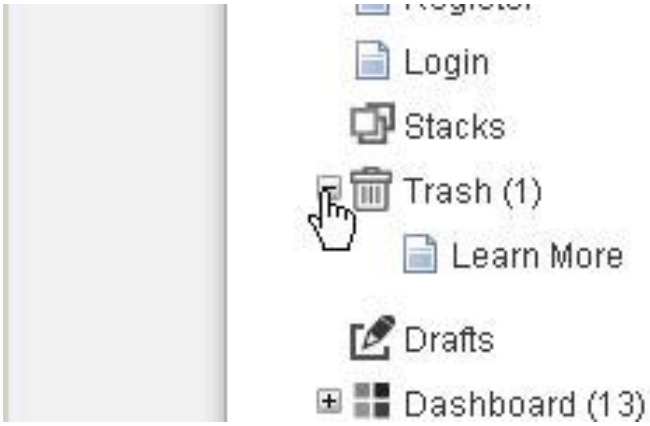


3. The **Show System Pages** option will appear. Click the checkbox for the **Show System Pages** option.

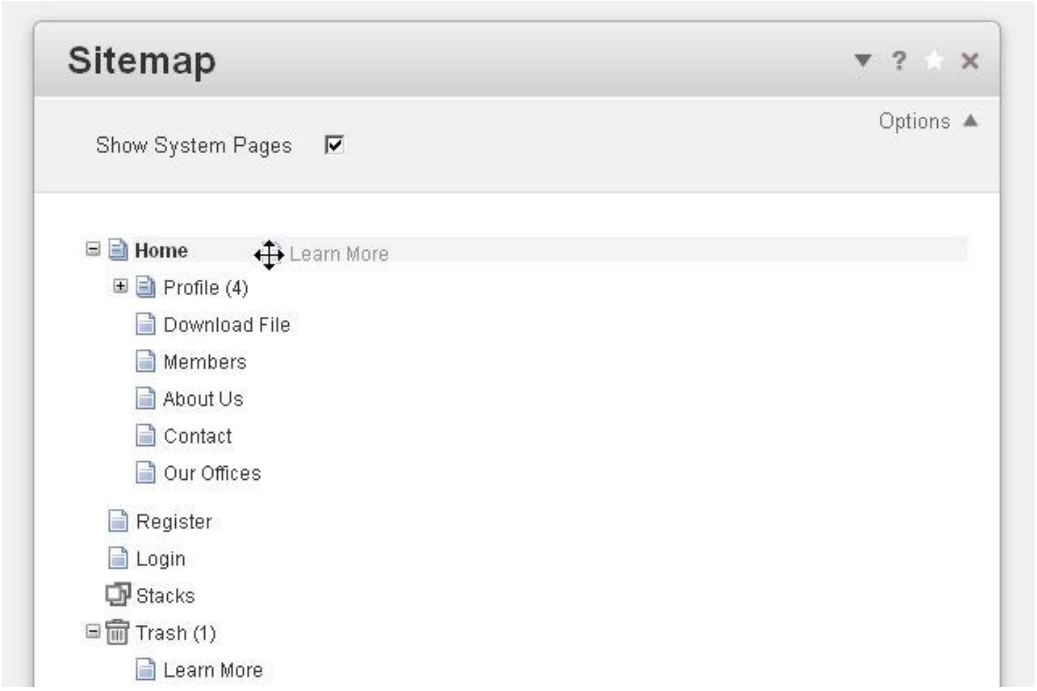


Continued...

4. The Sitemap listing will be updated to include the **Trash**. Click the **+** symbol to the right of the word **Trash** to display all the pages contained in the **Trash**.

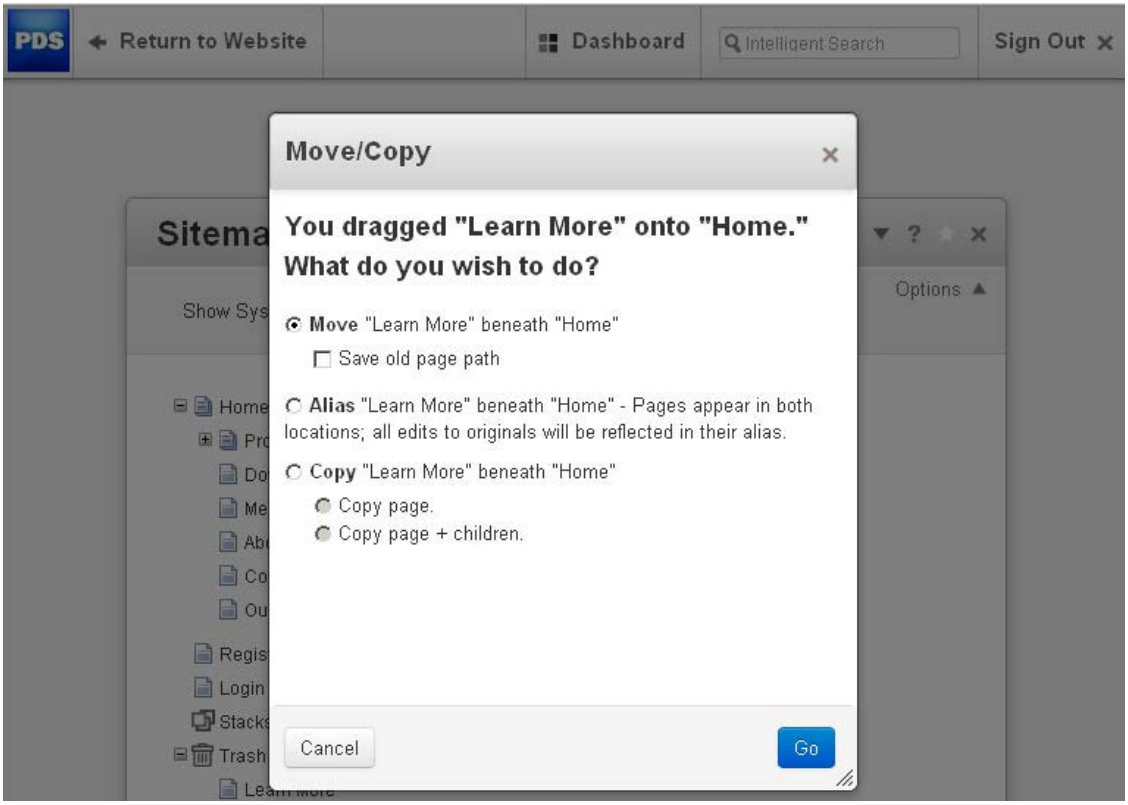


5. Roll your mouse over the white paper icon to the left of the name of the page that you wish to restore from the trash. Your mouse pointer will change into a black four way arrow.
6. While your mouse cursor appears as a black four way arrow, click and hold your left mouse button.
7. While continuing to hold your left mouse button, drag the page up to the listing of pages that currently appear on your site.
8. Position your cursor over the name of the page beneath which you would like the page you are restoring to appear. Release your left mouse button.



Continued...

9. The **Move / Copy** window will appear. Click the blue **Go** button that appears in the lower right hand corner of the **Move / Copy** window.

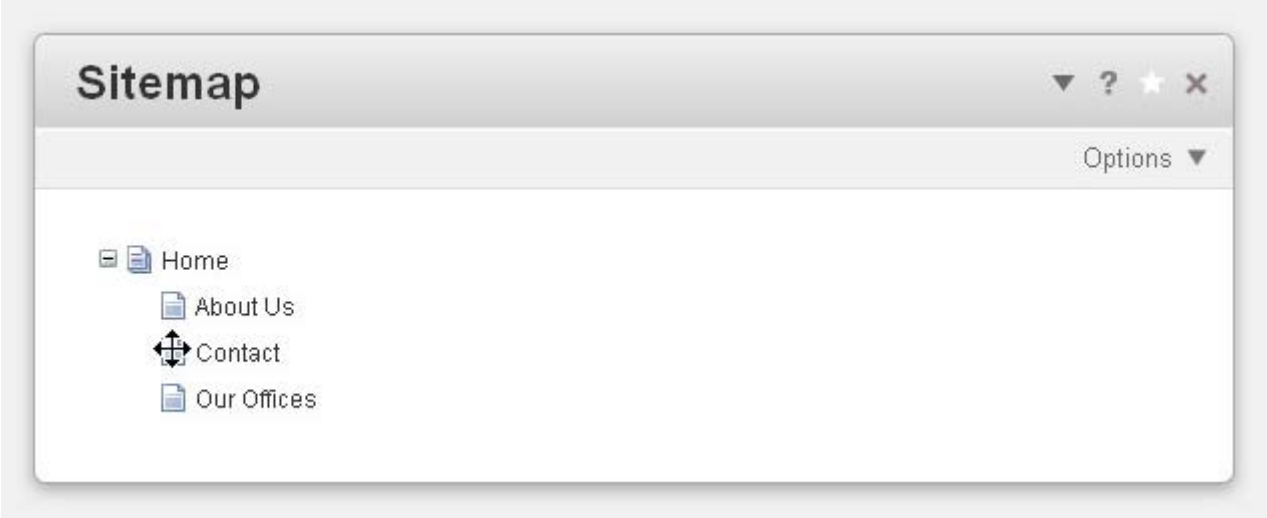


10. The **Move / Copy** window will disappear. The page you dragged from the **Trash** will now appear beneath the page that you released it over in the **Sitemap** listing.

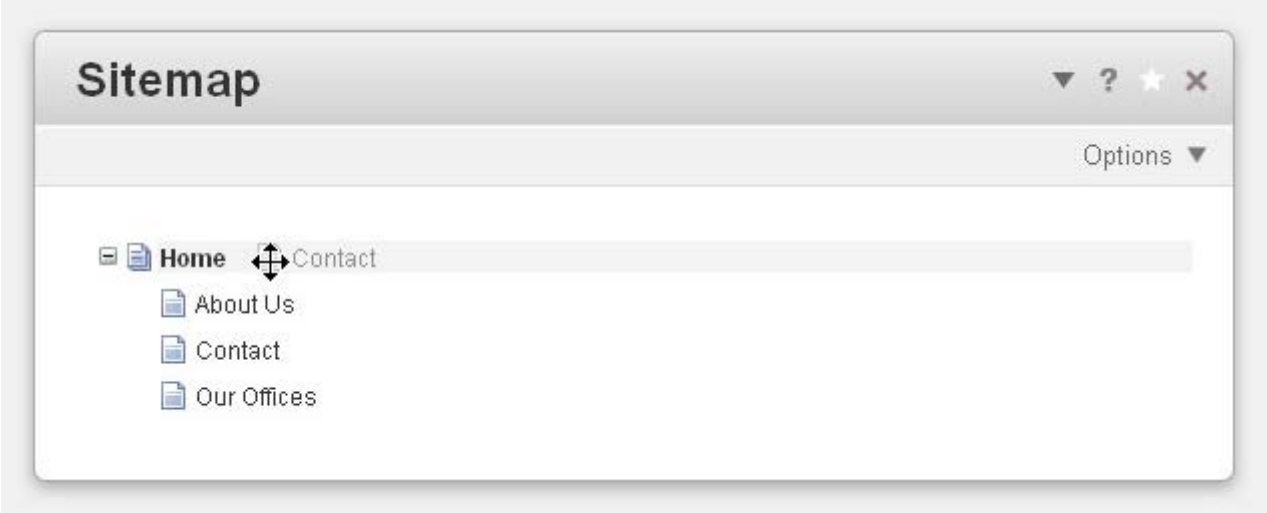
Copy a Page

PDS eCMSpro allows you to create duplicate copies of pages on your site using the **Sitemap**. These duplicate copies will be completely independent of one another. Changes made to one copy will not be reflected on the other.

1. Visit the **Sitemap**.
2. Identify the page you wish to copy. Roll your mouse over the white paper icon to the left of the name of the page that you wish to copy. Your mouse pointer will change into a black four way arrow.
3. While your mouse cursor appears as a black four-way arrow, click and hold your left mouse button.

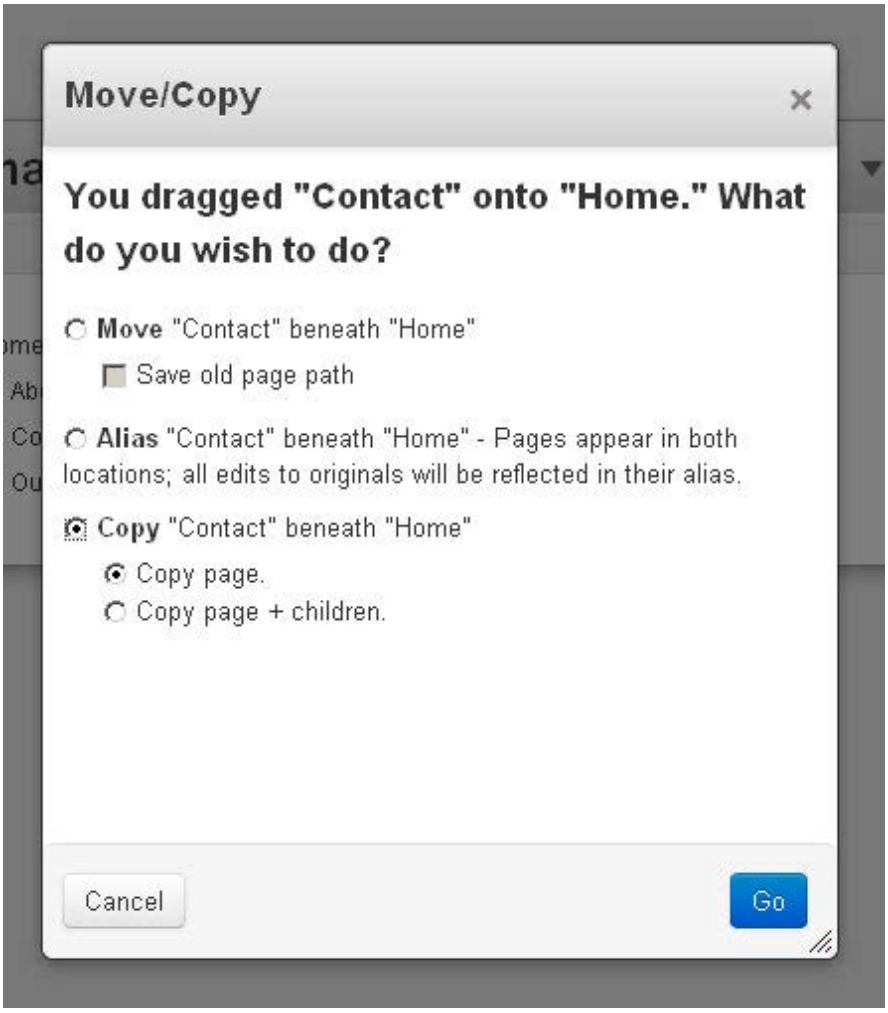


4. While continuing to hold your left mouse button, drag the page you wish to copy on top of the page beneath which you would like the copy to appear.



Continued...

5. Release your left mouse. The **Move / Copy** window will appear.
6. Select the **Copy** option.

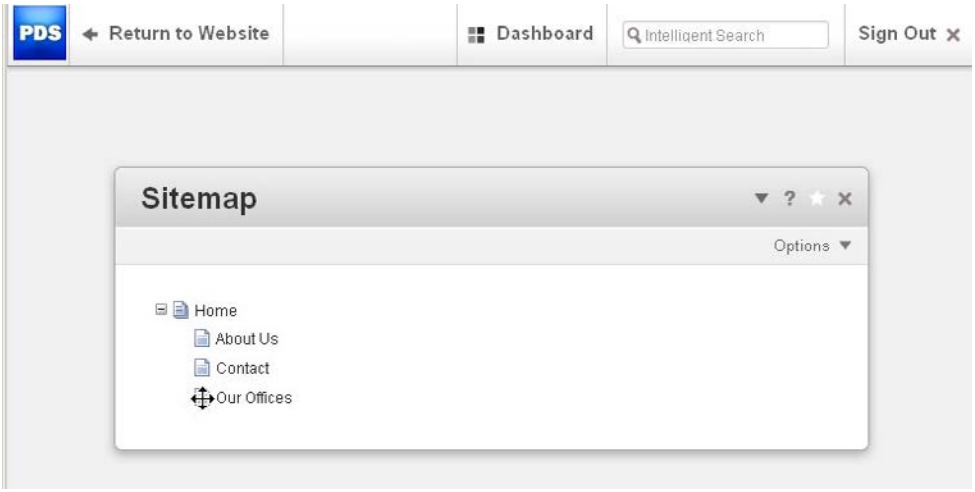

Move/Copy
You dragged "Contact" onto "Home." What do you wish to do?
Move "Contact" beneath "Home"
Save old page path
Alias "Contact" beneath "Home" - Pages appear in both locations; all edits to originals will be reflected in their alias.
Copy "Contact" beneath "Home"
Copy page.
Copy page + children.
Cancel
Go

7. Click the blue **Go** button that appears in the lower right hand corner of the **Move / Copy** window.
8. The **Move / Copy** option will disappear and you will be returned to the **Sitemap**. The copy will now appear in the **Sitemap** listing beneath the page you dragged the original onto.

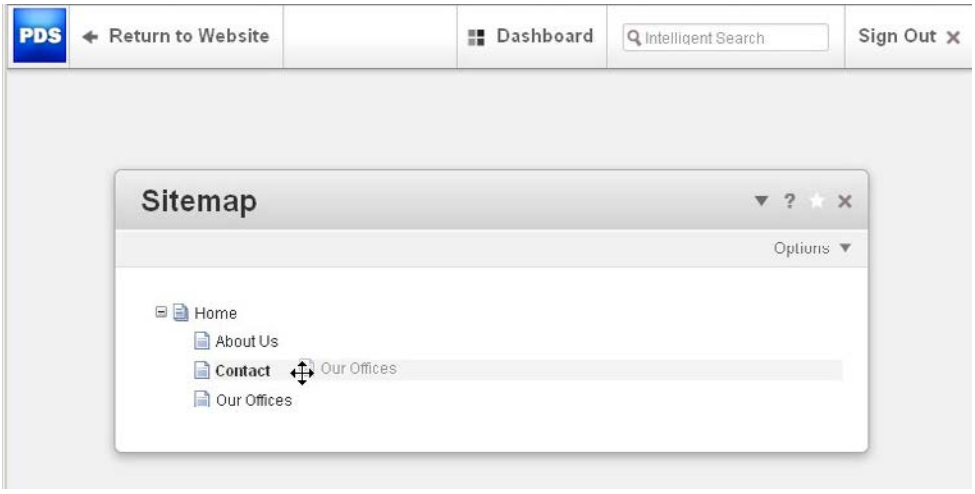
Create a Page Alias

In some circumstances you may wish to have a link to a page appear in multiple places on the public navigation menu of your site. PDS eCMSpro allows you to create Page Aliases so that a single page can appear in multiple places on your public navigation menu. A Page Alias acts as a pointer back to your original page. Visitors who click a Page Alias link on your public navigation menu will be directed to the original page.

1. Visit the **Sitemap**.
2. Identify the page you wish to create a **Page Alias** for. Roll your mouse over the white paper icon to the left of the name of the page that you wish to create a **Page Alias** for. Your mouse pointer will change into a black four-way arrow.
3. While your mouse cursor appears as a black four-way arrow, click and hold your left mouse button.

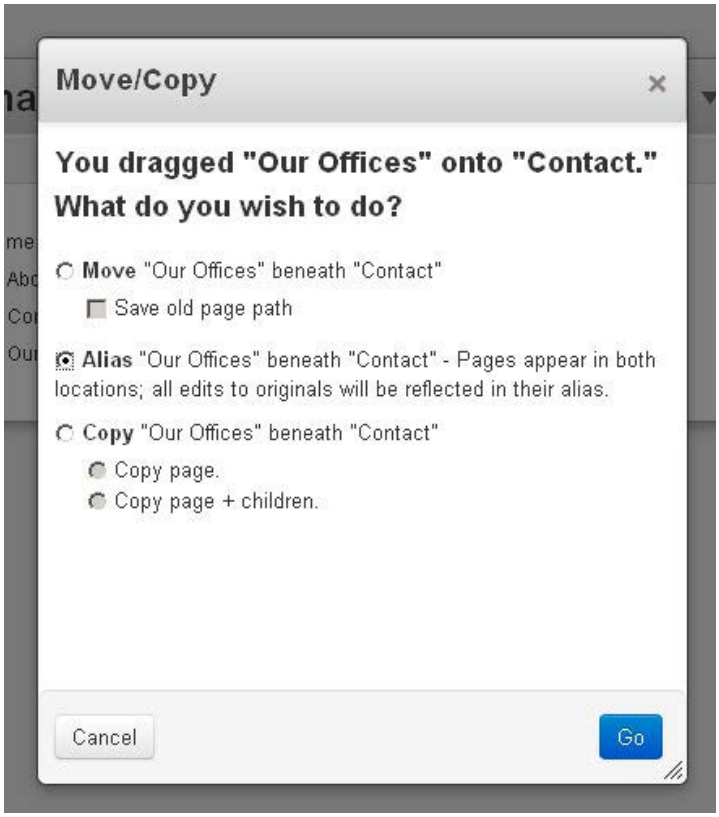


4. While continuing to hold your left mouse button, drag the page you wish to create a **Page Alias** for on top of the page beneath which you would like the **Page Alias** to appear.

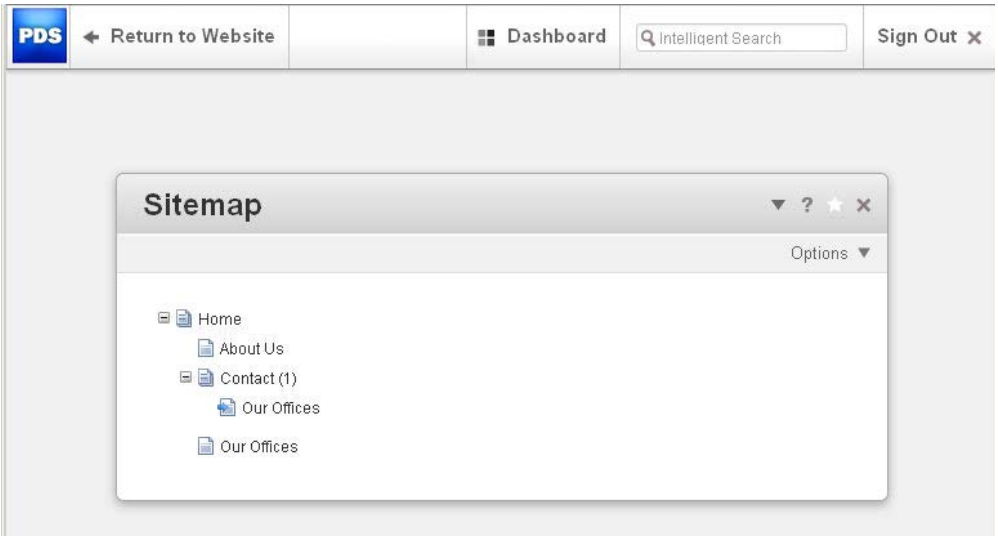


Continued...

5. Release your left mouse. The **Move / Copy** window will appear.
6. Select **Alias** option.


Move/Copy
You dragged "Our Offices" onto "Contact."
What do you wish to do?
Move "Our Offices" beneath "Contact"
Save old page path
Alias "Our Offices" beneath "Contact" - Pages appear in both locations; all edits to originals will be reflected in their alias.
Copy "Our Offices" beneath "Contact"
Copy page.
Copy page + children.
Cancel
Go

7. Click the blue **Go** button in the lower right hand corner of the Move / Copy window.
8. The **Move / Copy** window will disappear and you will be returned to the **Sitemap**.
9. The **Sitemap** listing will be updated to include the new **Page Alias**. Page Aliases are identified on the sitemap by white paper icons with blue arrows.

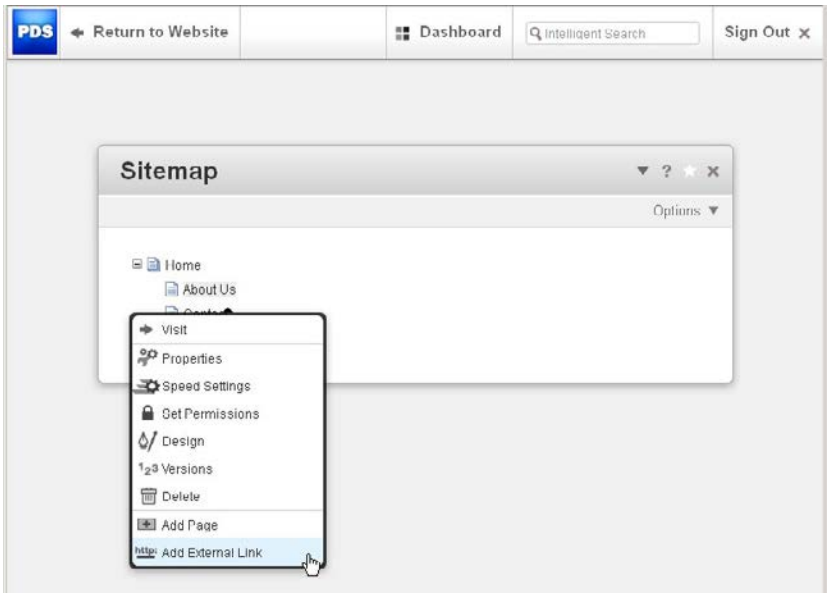


External Links

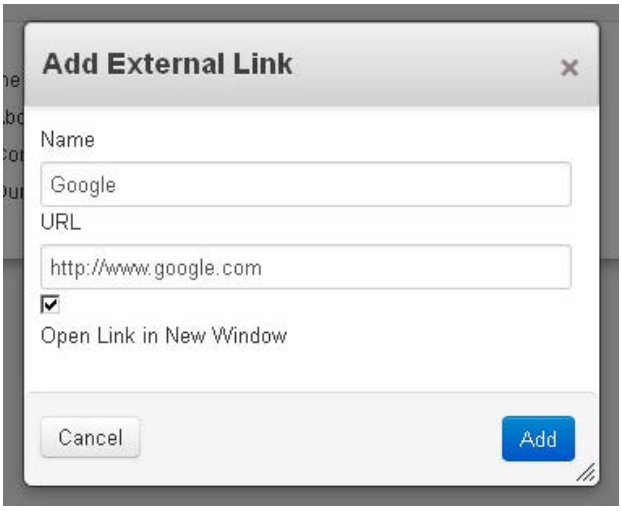
The public navigation menu of your PDS eCMSpro website may include links that direct visitors to external websites that are not part of your website. You can create and manage these **External Links** using the **Sitemap**.

Create an External Link

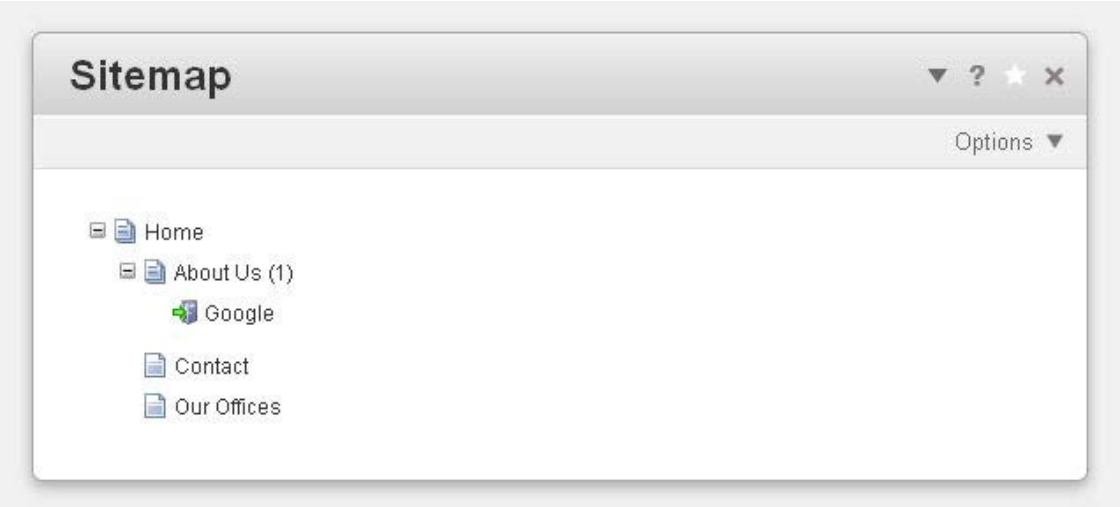
1. Visit the **Sitemap**.
2. Identify the page beneath which you would like to create the **External Link**.
3. Click the name of the page beneath which you would like to create the **External Link** once with your left mouse button to display the **Context Menu**.
4. Click the **Add External Link** command that appears at the bottom of the **Context Menu**.



5. The **Add External Link** window will appear. Enter the name and URL web address of the external website you wish to create the **External Link** to.
6. Be certain to check the **Open in New Window** checkbox to prevent visitors from being directed completely away from your website.



7. Click the blue **Add** button that appears in the lower right hand corner of the **Add External Link** window.
8. The **Add External Link** window will disappear and you will be returned to the **Sitemap**.
9. The **Sitemap** listing will be updated to include the **External Link** that you created. **External Links** are identified in the **Sitemap** by gray icons with green arrows.



Edit an External Link

1. Visit the **Sitemap**.
2. Identify the **External Link** you wish to edit and click it once with your left mouse button to display the **Context Menu**.
3. Click the **Edit External Link** command that is displayed on the **Context Menu**.
4. The **Edit External Link** window will appear. Adjust the external link and click the blue **Save** button that appears in the lower right hand corner of the **Edit External Link** window.
5. The **Edit External Link** window will disappear and you will be returned to the **Sitemap**.

Delete an External Link

1. Visit the **Sitemap**
2. Identify the **External Link** you wish to edit and click it once with your left mouse button to display the Context Menu.
3. Click the **Delete** command that is displayed on the **Context Menu**.
4. The **Delete** window will appear. Click the red **Delete** button to confirm the deletion.
5. The **Delete** window will disappear and you will be returned to the **Sitemap**.

User Accounts

PDS eCMSpro websites may feature a single user account or a small number of user accounts that PDS has configured to allow content to be added and updated. Websites that have more complex requirements may have access to the **Members**, **Groups** and **Permissions** tools to control what information is available and to whom.

If your website package includes the capability to create and manage new user accounts the following sections explain how to perform common tasks that you will encounter.

Note:

PDS eCMSpro uses the terms “Members” and “Users” interchangeably. Please keep this in mind while working with the software and reading this document.

Purpose of User / Member Accounts

There are several common purposes for Member / User accounts:

- **Editing your website**: The username and password you enter to sign into your site is a user account.
- **Password Protected Areas**: If your website features an area that is only accessible to registered users the username and password that they enter to access this portion of your site is a user account.
- **eCommerce**: If your PDS eCMSpro website package includes an online shopping component each registered customer is represented by a user account.

Reviewing User Accounts

Follow the steps below to display a listing of all the user accounts that are configured for your website:

1. Click the **Dashboard** button on the Toolbar to visit the “Full Dashboard” page.
2. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
3. The **Search Users** screen will appear. The **Search Users** screen displays a table that lists each user account in a row. The Username, Email Address, Date of Last Modification and Number of Logins are displayed in this table.

Multiple Pages

By default the Search Users screen displays 10 users at a time. If your website includes more than 10 user accounts you can use the **Next** and **Previous** controls at the bottom of the screen to navigate between the pages of user accounts. You can display more than 10 users per page by adjusting the **# Per Page** option in the upper right and then clicking the **Search** button.

Searching Users

The **Find Users** screen includes a **Keywords** search field in the upper left. You can type part of a username or email address into the search field and then press the **Search** button on the upper right to search the listing of users for a specific account.

Creating New User Accounts

Follow the steps below to create a new user account for your site:

1. Click the **Dashboard** button on the **Toolbar**.
2. Locate the **Members** section of the **Dashboard** and click the **Search Users** link.
3. Click the blue **Add User** button in the upper right.
4. You will be directed to the **Add User** screen.
5. Fill out the Username, Password and Email Address fields. All three fields must be filled out to create a user account.
6. Assign the user account to the correct group(s) by checking off the group(s) the user should belong to in the **Groups** section of the screen.

ADDING A USERS TO A GROUP CAN GIVE THAT USER
THE POWER TO EDIT OR DELETE INFORMATION FROM YOUR WEBSITE.

During PDS eCMSpro training sessions the purpose of each group on your site is reviewed in detail. Every website has different group requirements. Your website may include a single “Administrators” or “Editors” group or may contain dozens of groups that represent different collections of users within your organization.

Website editing privileges are determined by groups. If you are not familiar with the purpose of the groups on your site you could inadvertently give users the ability to edit or delete information from your website.

If you are not certain what group a user should be added to contact Pabodie Design.

7. Once you have completed the User Information fields and checked the appropriate group(s) click the **Add User** button in the lower right to create the user account.

“The email address is already in use.” Message

If a red message appears that reads “The email address is already in use.” this indicates that another account has already been created on your site using the email address you entered. Only one account can be created on your site per email address.

Locate the Existing Account

If you encounter this message you should return to the **Search Users** screen to locate the existing account using the email address you entered. Return to the **Search Users** screen and enter this email address into the **Keywords** search field in the upper left. Click the **Search** button on the right to search the users accounts on your site. The table of user accounts will adjust to display the account associated with the email address you entered. Review this account to determine if it needs to be adjusted to fit your purposes.

Updating User Information

If there are numerous user accounts configured for your website it may become necessary to update the details of these accounts over time. Common adjustments you may need to make to a user account include:

- Resetting a user's password
- Deactivating a user account for a person who is no longer part of your organization

In the next sections we will detail the steps to perform these common adjustments.

Reset a Password

Users can always reset their own passwords for your website by visiting the login screen and using the **Forgot Password** tool in the lower section of the screen. The login screen is accessed by first visiting the homepage of your website then adding **/login** to the end of your website address. See the example below:

www.example.com/login

If you would prefer to manually reset the password for a user account, follow the steps below:

1. Click the **Dashboard** button on the **Toolbar** to visit the **Full Dashboard** page.
2. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
3. The **Search Users** screen will appear. Use the **Keyword Search** to locate the user account you wish to reset the password for.
4. Once the user account you wish to change the password for is displayed on the **Search Users** screen click the entry in the username column for that account.
5. The **View User** screen will appear.
6. Click the **Edit User** button in the upper left hand corner of the **View User** screen. The **Edit User** screen will appear.
7. The **Edit User** screen allows you to adjust the Username, Email Address and Password of a user account. Locate the **Change Password** section. Enter the new password in the Password field on the left and then enter the same password in the Confirm Password field on the right.

NOTE: Passwords must be at least six characters in length. If you enter a password that is less than six characters you will not be able to save the adjustment.

8. Once you have filled out the Password and Confirm Password fields click the blue **Update User** button in the lower right hand corner of the screen.

Deactivate or Reactivate A User

If a person that has access to edit your website leaves your organization you should deactivate their user account to prevent unauthorized access to or editing of your website. Follow the steps below to deactivate a user account so the user can no longer access password protected pages on your PDS eCMSpro website or perform edits.

1. Click the **Dashboard** button on the Toolbar to visit the **Full Dashboard** page.
2. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
3. The **Search Users** screen will appear. Use the **Keywords** search tool to locate the user account you wish to deactivate.
4. Once the user account you wish to deactivate is displayed on the **Search Users** screen click the entry in the username column for that account.
5. The **View User** screen will appear. The **Basic Details** section will list the username and password of the account.
6. Locate the **Deactivate User** button in the upper left of the **View User** screen. The **Deactivate User** button appears immediately to the right of the **Edit User** button.

7. Click the **Deactivate User** button to deactivate the user account. A blue message that reads “ User deactivated.” will appear.

Notes

- If you reach the **View User** screen and you see an **Activate User** button rather than a **Deactivate User** button this means that the user account has already been deactivated.
- To reactivate a user account follow steps 1 through 6 above and press the **Reactivate User** button rather than the **Deactivate User** button.

Groups

Groups are collections of related user accounts. Each website has different needs and your website likely includes a number of groups that serve different purposes. Common purposes of a group include:

- Permitting users to edit your website
- Permitting users to read a password protected section of your website

Most PDS eCMSpro websites include an Administrators group. User accounts that belong to the Administrators group can edit your website and have access to the **Dashboard**. Your website likely includes additional groups that were tailored to the needs of your organization during the development process. During your PDS eCMSpro training the purpose of each of these additional groups on your site was reviewed.

PLEASE NOTE:
Extreme care must be taken when adjusting the groups that a user belongs to.
Adding a user to a group can give that user the power to edit your website.

If you do not know what group a user should be added to please contact PDS.

Adding a User to a Group

Follow the steps below to add a user account to an existing group on your website.

1. Click the **Dashboard** button on the Toolbar to visit the **Full Dashboard** page.
2. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
3. The **Search Users** screen will appear. Use the **Keywords** search tool to locate the user account you wish to add to a group.
4. Once the user account you wish to add to a group is displayed on the **Search Users** screen click the entry in the username column for that account.
5. The **View User** screen will appear. Click the **Edit User** button in the upper left hand corner of the **View User** screen. The **Edit User** screen will appear.
6. Locate the **Groups** section of the **Edit User** screen. The **Groups** section will display a listing of any groups the user account currently belongs to.
7. Click the **Add Group** button that appears on the right hand side of the Groups section.

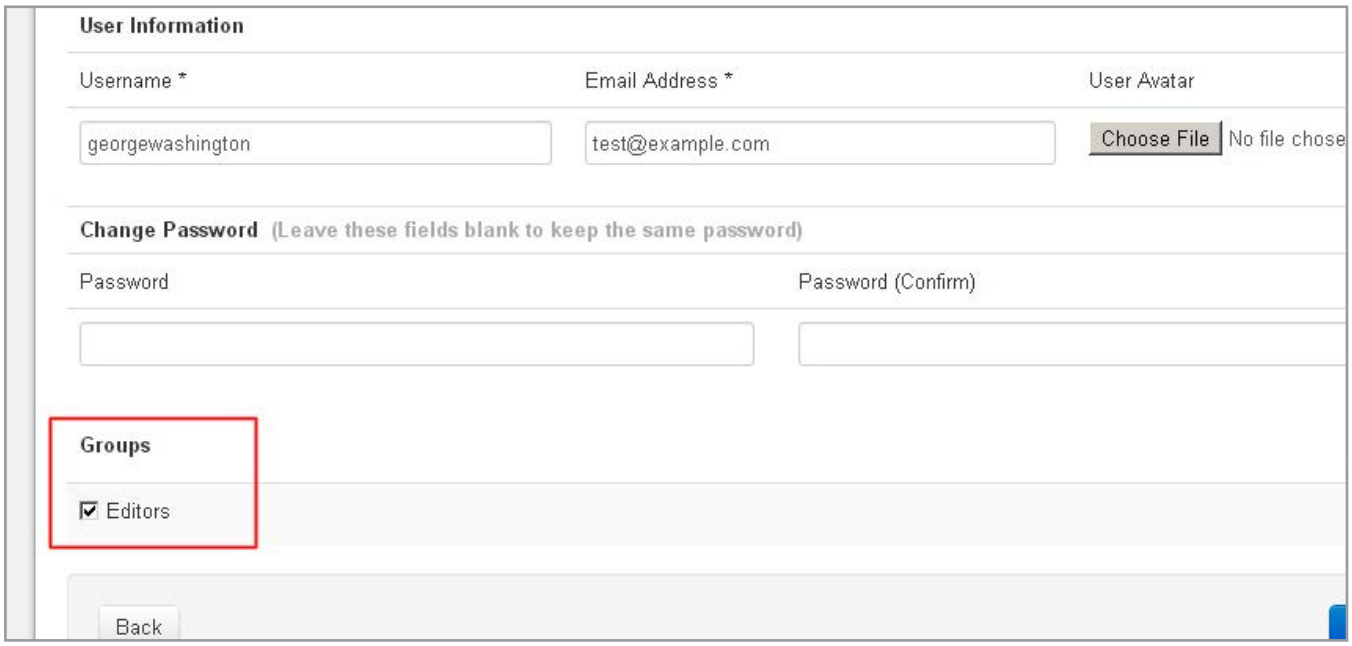
continued....

8. The **Add Groups** window will appear. Click the name of the group that you wish to add the user to.
9. The **Add Groups** window will disappear and group that you clicked will now appear in the **Groups** listing of the **Edit User** screen. Click the blue **Update User** button the lower right to save this change. A blue message that reads, “User updated successfully.” will appear at the top of the screen.

Remove a User From a Group

Follow the steps below to remove a user from a group that the user currently belongs to.

1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
3. The **Search Users** screen will appear. Use the **Keywords** search to locate the user account you wish to remove from a group.
4. Once the user account you wish to remove from a group is displayed on the **Search Users** screen click the entry in the username column for that account.
5. The **View User** screen will appear. Click the **Edit User** button in the upper left hand corner of the **View User** screen. The **Edit User** screen will appear.
6. Locate the **Groups** section of the **Edit User** screen. The **Groups** section will display a listing of any groups the user account currently belongs to.
7. Identify the listing for the group that you want to remove the user from in the **Groups** section. Uncheck the checkbox to the left of the name of this group.



8. Click the blue **Update User** button on the lower right to save this change.
9. A blue message that reads, “User updated successfully.” will appear at the top of the screen. The Groups section will no longer list the group that you removed the user from.

Permissions

During the development process PDS created the groups that are configured on your site. For many websites these initial groups fulfill all the necessary user access requirements.

Large PDS eCMSpro websites that frequently add many pages or users may also need to adjust user access privileges as they grow. PDS eCMSpro uses the **Permissions** system to grant users and groups specific capabilities for large and growing websites.

Depending upon the nature of your website your website package may include **Permissions** functionality. The following sections detail situations where it may be necessary to adjust Permissions and the necessary steps to perform these adjustments.

If your website package does not include Permissions functionality you will not have access to these features.

Please Note: If your website package includes access to the Permissions system the Permissions configuration of your website was detailed during your training sessions. Adjusting the Permissions will impact which users can read and edit your site.

If you are not familiar with the existing Permissions configuration of your website please contact PDS.

When to Adjust Permissions

The two most common purposes of adjusting permissions are controlling who can edit your site and who can read your site. Below are examples of common situations for each of these purposes.

Controlling Who Can Edit Your Website

- You have created a new section of your website and you want to give a group or user the ability to edit this section.
- You want to prevent a specific user or group from editing a particular section of your website.

Controlling Who Can Read Your Website

- You want to prevent the public from reading a specific page or section of your website.
- You want to give a user or group the ability to read a specific page or section of your website.

The following sections detail the steps required to adjust permissions for each of these circumstances.

When to Create New Groups

If the permissions change you need to make will apply to more than one user you can use groups to apply permissions to all the users that belong to a group simultaneously.

- If all the users you need to change permissions for belong to an existing group on your web-site, apply permissions changes to this group.

- If the users do not belong a group you should create a new group, add the appropriate users to this group then apply permissions to the group.

Creating a Group

Follow the steps below to create a new group.

1. Click the **Dashboard** button on the **Toolbar** to visit the **Full Dashboard** page.
2. Locate the **Members** section of the **Dashboard**. Click the **User Groups** link that appears near the top of the **Members** section.
3. The **Groups** screen will appear. Click the blue **Add Group** button in the upper right hand corner.
4. The **Add Group** screen will appear. Enter a name for the group in the Name field. You should name the group in such a way that its purpose will be immediately obvious to you.
5. Click the blue **Add** button in the lower right hand corner of the **Add Group** screen.
6. You will be returned to the **Groups** screen. The group that you just created will appear in the listing on the **Groups** screen and the message “Group Added successfully.” will appear at the top of the screen in blue.

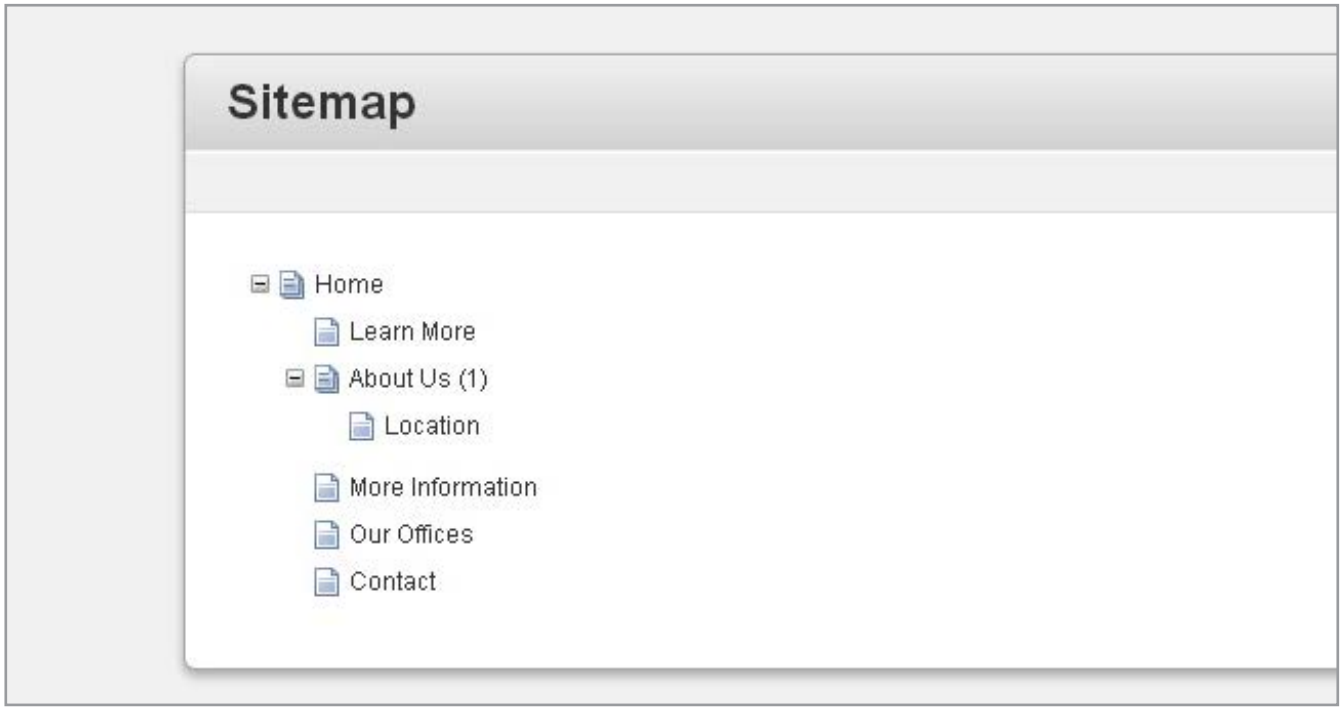
You can now follow the steps in the section titled **Adding Users to Groups** to place users into your newly created group and then follow the sections below to apply permissions to the group.

Permissions Inheritance

Adjustments to the permissions of your PDS eCMSpro website are made using the **Full Sitemap**. The **Sitemap** displays all the pages that appear on your site in a nested tree that can be expanded and collapsed.

This nested structure creates **Parent** and **Child** relationships between pages.

In this example, the “Home” page is the parent of the “About Us” page. The “Location” page is a child of the “About” page.



By default, permissions applied to any page using the **Sitemap** tree will be inherited by all subordinate pages that are the children of that page. In many situations, making an adjustment to the permissions of a parent page will also make that adjustment to the permissions of all the child pages beneath that parent page.

- Permissions inheritance allows you to easily give or revoke control over an entire section of your site at once.

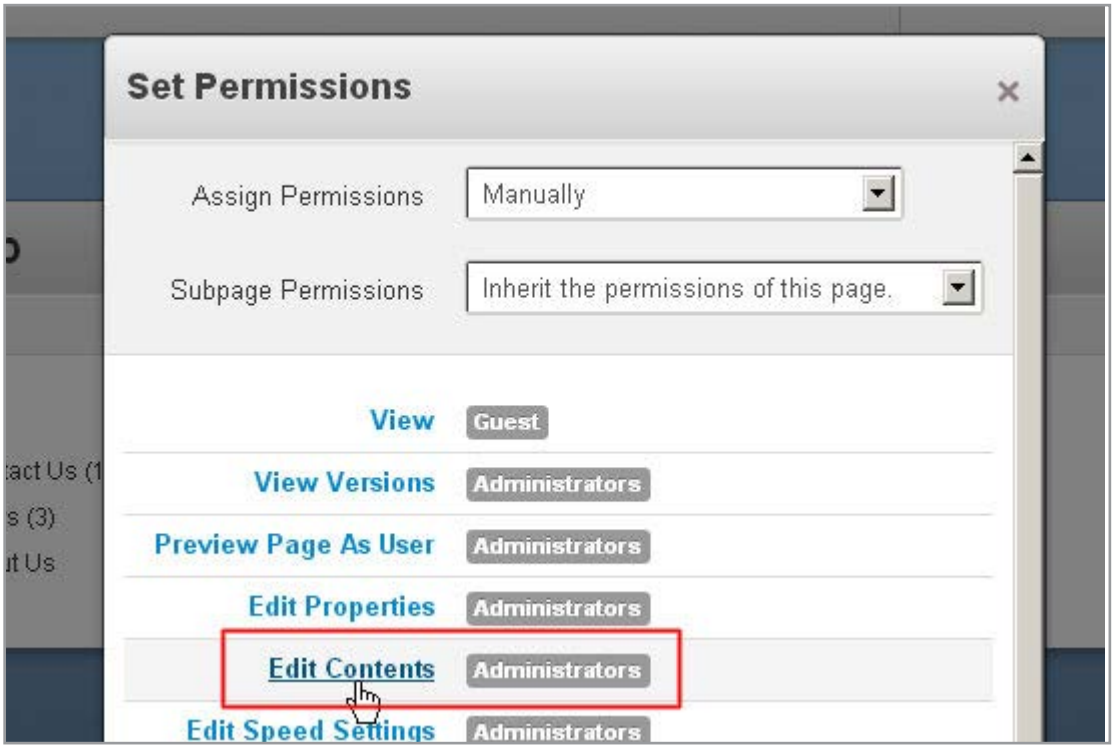
- The following sections describe how Permissions Inheritance can be overridden if necessary.

Give a User or Group the Ability to Edit a Specific Page or Section of Your Website

1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link that appears at the top of the **Sitemap** section.
3. Locate the name of the page you wish to give edit access to and click it with your left mouse button to display the **Context Menu**.
4. Locate the **Set Permissions** item in the **Context Menu**. Click the **Set Permissions** item with your left mouse button.
5. The **Set Permissions** screen will appear. The first option on the **Set Permissions** screen is titled **Assign Permissions**. If the **Assign Permissions** option reads “By Area of Site” or “From Page Type Defaults” change the **Assign Permissions** option to “Manually”.

6. If the **Assign Permissions** option read “By Area of Site” or “From Page Type” defaults and you changed it to “Manually” the **Confirm Change** window will appear. Click the red OK button in the lower right of the **Confirm Change** window to save the change and continue.
7. With **Assign Permissions** set to “Manually” you can now begin adjusting permissions for this page.
8. Click the blue **Edit Contents** link.

continued....



9. The **Edit Contents** window will appear. Locate the **Included** section at the top of the **Edit Contents** window. Click the **Add** link on the right hand side of the **Included** section.

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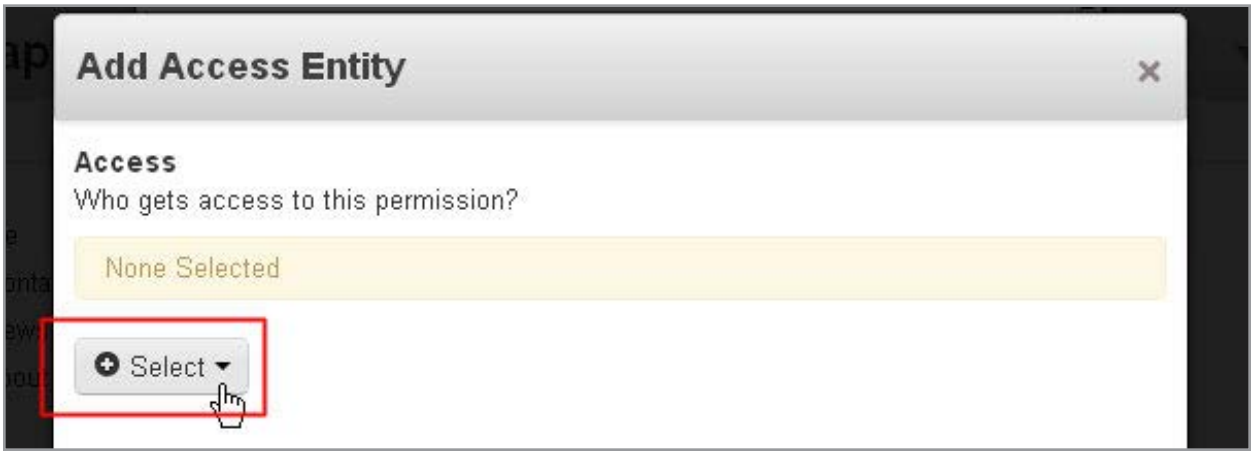
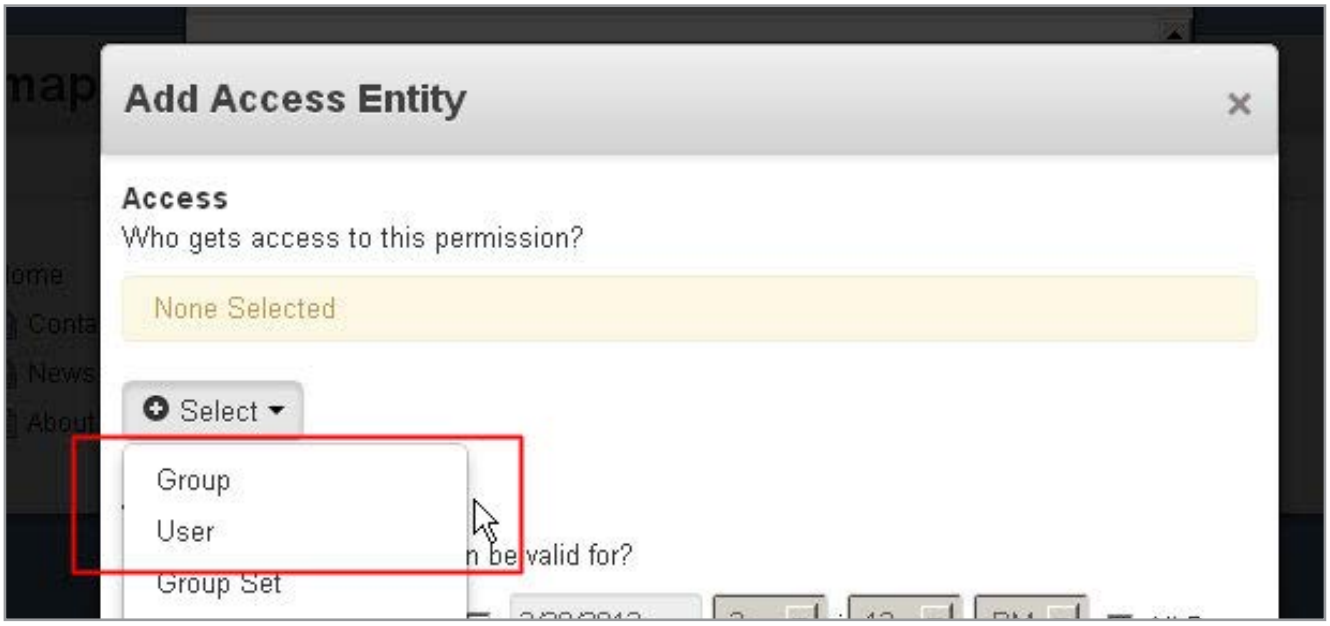
10. The **Add Access Entity** window will appear. Click the **Select** button that is located in the upper left of the **Add Access Entity** window.



11. The **Access Entity Dropdown** will appear:



- If you want to give a group access, click **Group**.

- If you want to give an individual user access, click **User**.

12. Depending upon your choice in Step 11, either the **Add Group** or **Add User** window will appear. Click the name of the user or group you wish to give edit privileges to.

13. The **Add Group** or **Add User** window will disappear. The name of the user or group you clicked will now appear in blue at the top of the **Add Access Entity** screen.

14. Click the blue **Save** button in the lower right of the **Add Access Entity** window.

continued....

15. You will be returned to the **Edit Contents** window. Click the blue Save button in the lower right of the **Edit Contents** window.
16. You will be returned to the Set Permissions window.
17. To complete the process of giving a group or user access to edit a section or page, repeat steps 8 - 16 for the following **Permissions** Items:

    - **Approve Changes**

    - **Edit Properties**

18. Once you have repeated steps 8 - 16 for the “Approve Changes” and “Edit Properties” **Permissions** Items click the blue **Save** button in the lower right hand corner of the **Set Permissions** window.
19. It is extremely important to test the new permissions you have configured to be certain you have not given the group or user edit access to pages of the site which they should not be able to edit. Click the **Dashboard** button to visit the **Full Dashboard**.
20. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.
21. The **Search Users** screen will appear.

    - If you adjusted the permissions for a group, locate a user that belongs to that group.

    - If you adjusted the permissions for a specific user, locate that user.

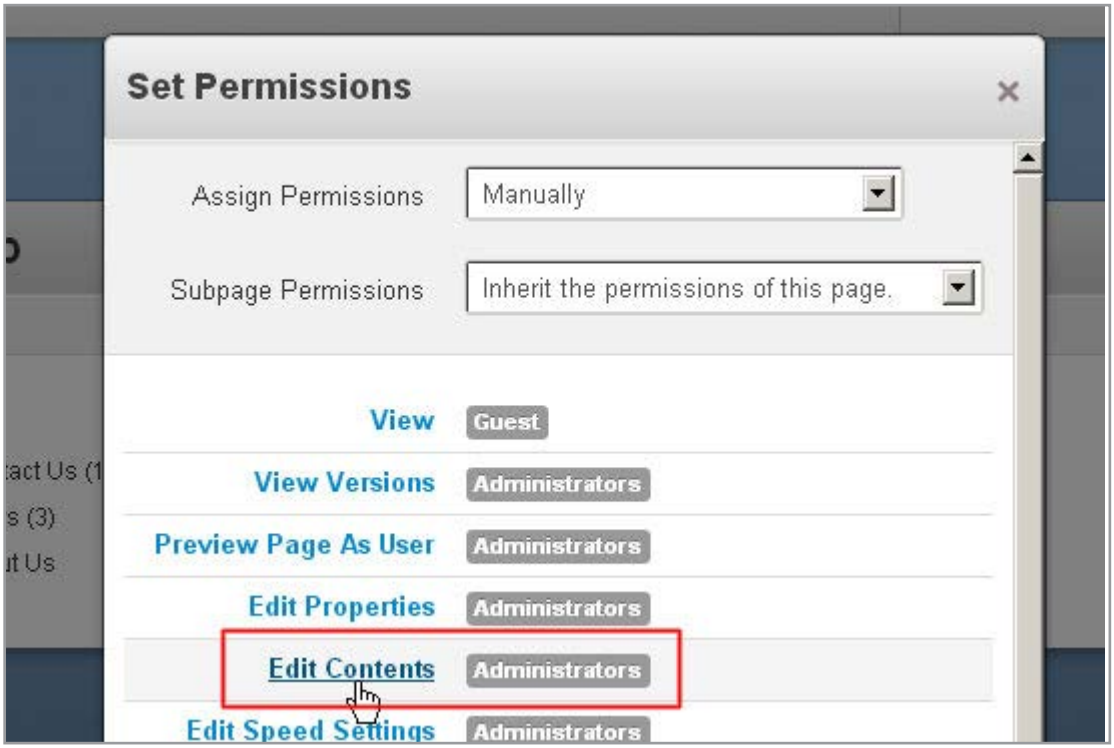
22. Click the entry in the username column for that the user. The **View User** screen will appear.
23. Click the **Sign In As User** button that appears at the top of the **View User** screen.
24. You have now signed into the website as this user. Navigate through the website and confirm that the user can edit the page or section you intend to give them access to and also confirm the user or group cannot edit any pages they should not have access to.

Prevent a User or Group From Editing a Specific Page or Section of Your Website

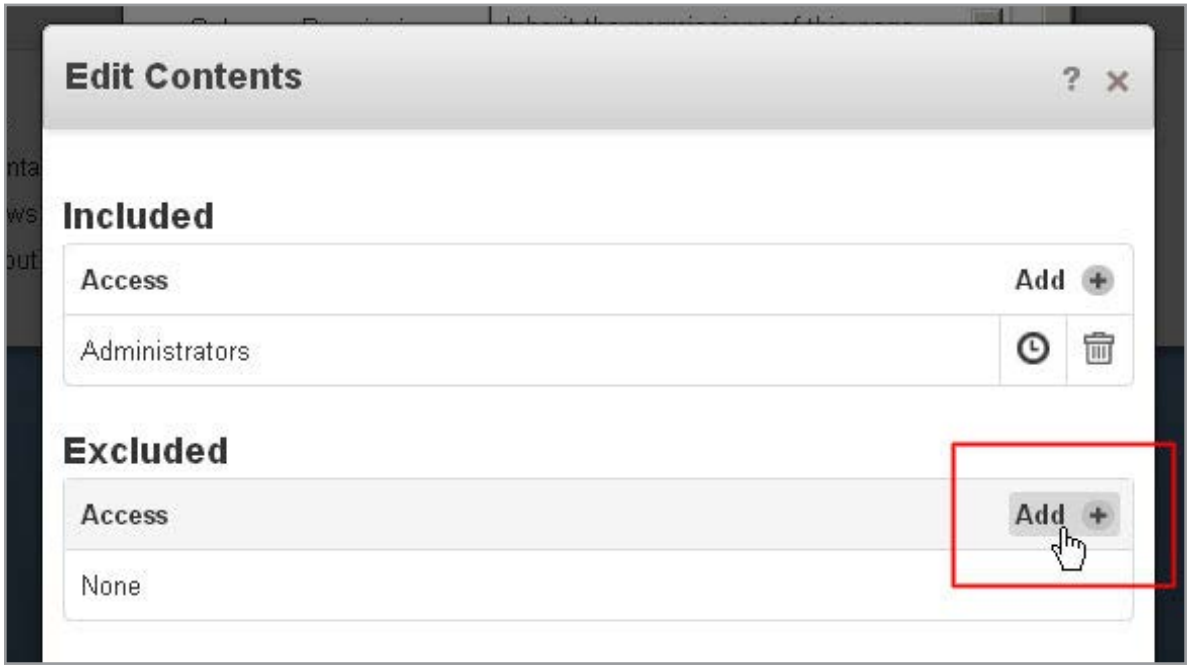
1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link that appears at the top of the **Sitemap** section.
3. Locate the name of the page you wish to give edit access to and click it with your left mouse button to display the **Context Menu**.
4. Locate the **Set Permissions** item in the **Context Menu**. Click the **Set Permissions** item with your left mouse button.
5. The **Set Permissions** screen will appear. The first option on the **Set Permissions** screen is titled **Assign Permissions**. If the **Assign Permissions** option reads “By Area of Site” or “From Page Type Defaults” change the **Assign Permissions** option to “Manually”.

6. If the **Assign Permissions** option read “By Area of Site” or “From Page Type” defaults and you changed it to “Manually” the **Confirm Change** window will appear. Click the red OK button in the lower right of the **Confirm Change** window to save the change and continue.
7. With **Assign Permissions** set to “Manually” you can now begin adjusting permissions for this page.
8. Click the blue **Edit Contents** link.

continued....



9. The **Edit Contents** window will appear. Locate the **Excluded** section at the bottom of the **Edit Contents** window. Click the **Add** link on the right hand side of the **Excluded** section.



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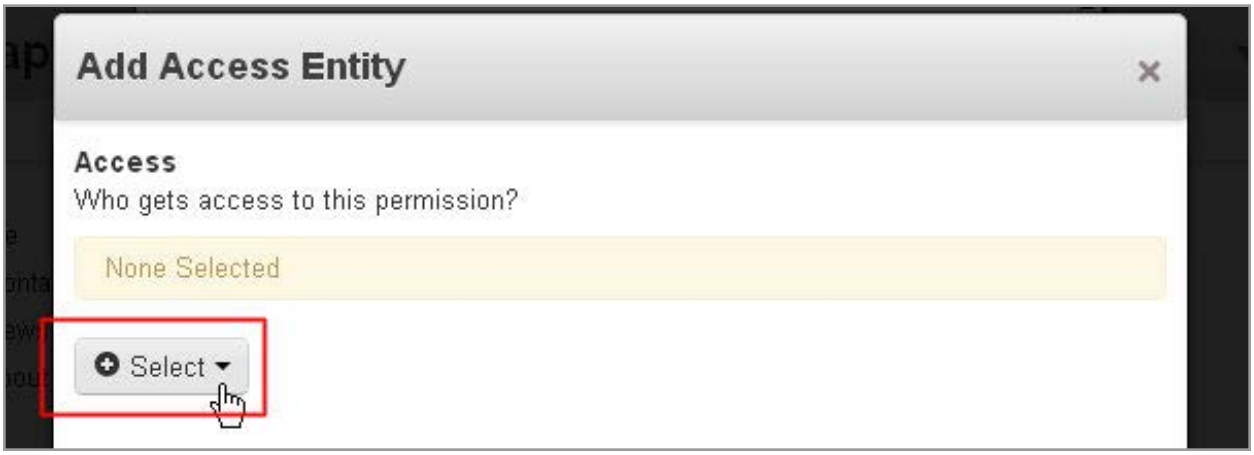
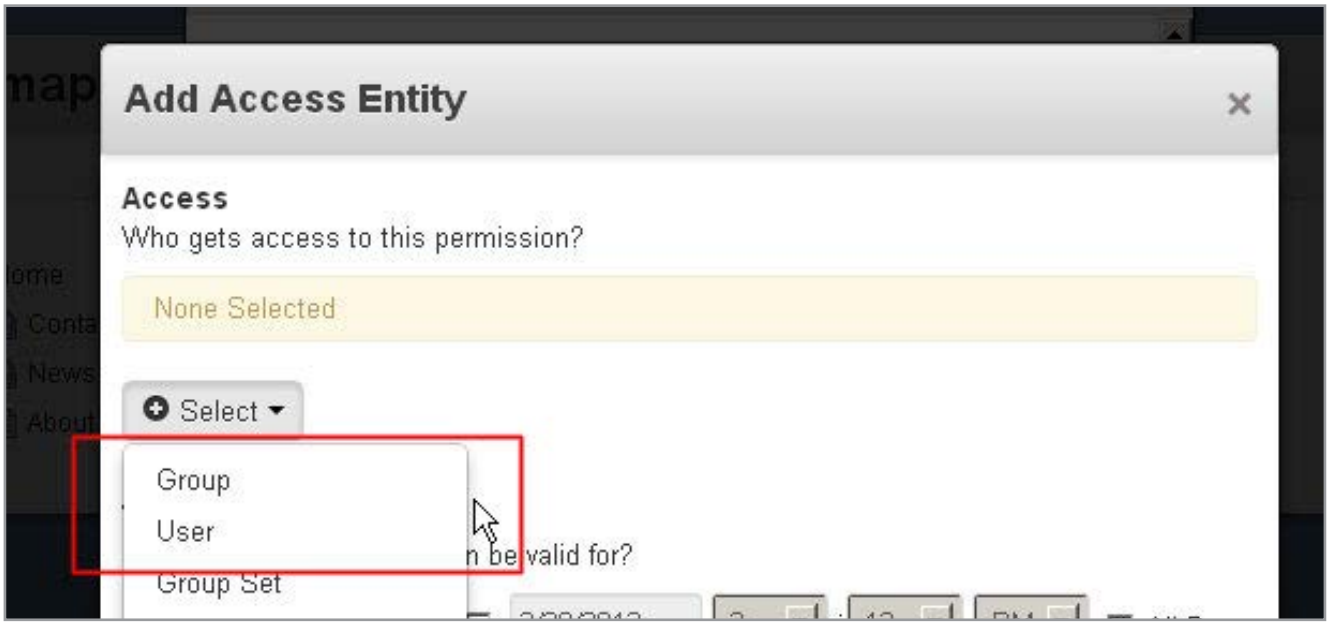
10. The **Add Access Entity** window will appear. Click the **Select** button that is located in the upper left of the **Add Access Entity** window.



11. The **Access Entity Dropdown** will appear:



- If you want to prevent a group from editing this page or section of your website , click **Group**.

- If you want prevent an individual user from editing this page or section, click **User**.

12. Depending upon your choice in Step 11, either the **Add Group** or **Add User** window will appear. Click the name of the user or group you wish to adjust.

13. The **Add Group** or **Add User** window will disappear. The name of the user or group you clicked will now appear in blue at the top of the **Add Access Entity** screen.

14. Click the blue **Save** button in the lower right of the **Add Access Entity** window.

continued....

15. You will be returned to the **Edit Contents** window. Click the blue Save button in the lower right of the **Edit Contents** window.

16. You will be returned to the Set Permissions window.

17. To complete the process of removing the ability for a group or user to edit a section or page, repeat steps 8 - 16 for the following **Permissions** Items:

    - Approve Changes

    - Edit Properties

    - Delete

    - Delete Versions

18. Once you have repeated steps 8 - 16 for the “Approve Changes” and “Edit Properties” **Permissions** Items click the blue **Save** button in the lower right hand corner of the **Set Permissions** window.

19. It is extremely important to test the new permissions you have configured to be certain that the user or group you are adjusting the permissions of cannot edit the page you have excluded them from but can edit the pages they do need to edit. Click the **Dashboard** button to visit the **Full Dashboard**.

20. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.

21. The **Search Users** screen will appear.

    - If you adjusted the permissions for a group, locate a user that belongs to that group.

    - If you adjusted the permissions for a specific user, locate that user.

22. Click the entry in the username column for that the user. The **View User** screen will appear.

23. Click the **Sign In As User** button that appears at the top of the **View User** screen.

24. You have now signed into the website as this user. Navigate through the website and confirm that the user can edit the pages they should be able to edit and cannot edit the pages they should not be able to edit.

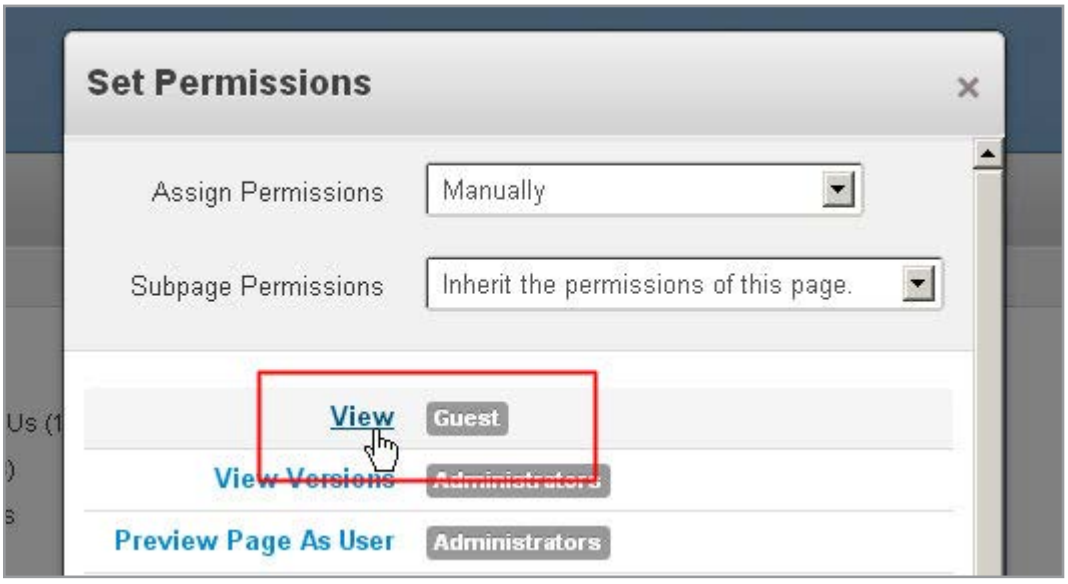
Hide a Specific Page or Section from the Public

Follow the steps below if you would like to use Permissions to prevent public visitors from visiting specific pages or sections of your website.

1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link that appears at the top of the **Sitemap** section.
3. Locate the name of the page you wish to give edit access to and click it with your left mouse button to display the **Context Menu**.
4. Locate the **Set Permissions** item in the **Context Menu**. Click the **Set Permissions** item with your left mouse button.
5. The **Set Permissions** screen will appear. The first option on the **Set Permissions** screen is titled **Assign Permissions**. If the **Assign Permissions** option reads “By Area of Site” or “From Page Type Defaults” change the **Assign Permissions** option to “Manually”.

6. If the **Assign Permissions** option read “By Area of Site” or “From Page Type” defaults and you changed it to “Manually” the **Confirm Change** window will appear. Click the red OK button in the lower right of the **Confirm Change** window to save the change and continue.
7. With **Assign Permissions** set to “Manually” you can now begin adjusting permissions for this page.
8. Click the blue **View** link.

continued....



9. The **View** window will appear. Locate the Ex**cluded** section at the bottom of the **View** window. Click the **Add** link on the right hand side of the **Excluded** section.
10. Locate the **Guest** item that is listed in the **Included** section. This represents the **Guest** group. All public visitors that have not logged in to your website belong to the **Guest** group.
11. Click the **Trash Can** icon to the right of the **Guest** item to remove the **Guest** group from the **Included** section.

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12. A green message reading “User/Group Removed” will briefly appear at the top of the **View** window to confirm that the **Guest** group has been removed from the **Included** section.
13. Click the blue **Save** button in the lower right hand corner of the **View** window. This saves the adjustment. You will be returned to the **Set Permissions** window.
14. Save the adjustment by clicking the blue **Save** button in the lower right hand corner of the **Set Permissions** window.
15. It is extremely important to test the new permissions you have configured to be certain that all the areas of your site that should be public remain publicly available. Click the **Sign Out** button in the upper right hand corner of your web browser to log out and view the site as a public user.
16. Navigate through your site and confirm that all pages that should be available to the public remain available.

Allow Only a Specific User or Group to Read a Specific Section of Your Website

Using the PDS eCMS Pro permissions system you can configure a specific page or section of your site to be available to only a certain user or group of users. This is ideal for private sections for employees and will require that a user enter their username and password before they can visit the page or section.

To make a page or section only available only to registered users, first follow the steps in the **Hide a Specific Page or Section from the Public** section above to prevent the public from accessing the page or section of your site you wish to require a username and password for.

Once you have limited public access to the page or section, follow the steps below to grant access to that page or section to a specific user or group.

1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link that appears at the top of the **Sitemap** section.
3. Locate the name of the page you wish to give edit access to and click it with your left mouse button to display the **Context Menu**.
4. Locate the **Set Permissions** item in the **Context Menu**. Click the **Set Permissions** item with your left mouse button.
5. The **Set Permissions** screen will appear. The first option on the **Set Permissions** screen is titled **Assign Permissions**. If the **Assign Permissions** option reads “By Area of Site” or “From Page Type Defaults” change the **Assign Permissions** option to “Manually”.

6. If the **Assign Permissions** option read “By Area of Site” or “From Page Type” defaults and you changed it to “Manually” the **Confirm Change** window will appear. Click the red OK button in the lower right of the **Confirm Change** window to save the change and continue.
7. With **Assign Permissions** set to “Manually” you can now begin adjusting permissions for this page.
8. Click the blue **View** link.

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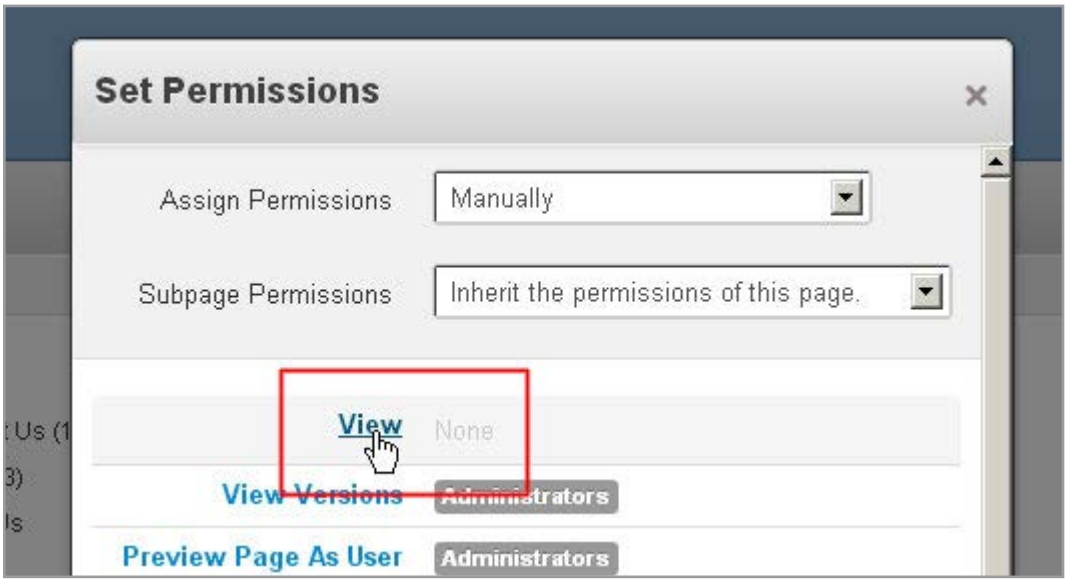
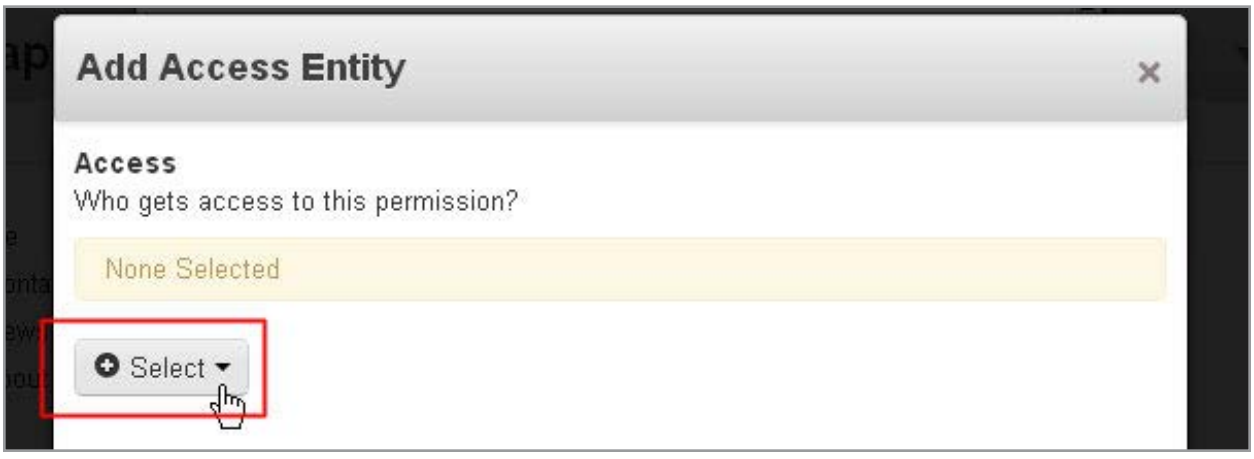


9. The **View** window will appear. Locate the **Included** section at the top of the **View** window. Click the **Add** link on the right hand side of the **Included** section.

10. The **Add Access Entity** window will appear. Click the **Select** button that is located in the upper left of the Add Access Entity window.



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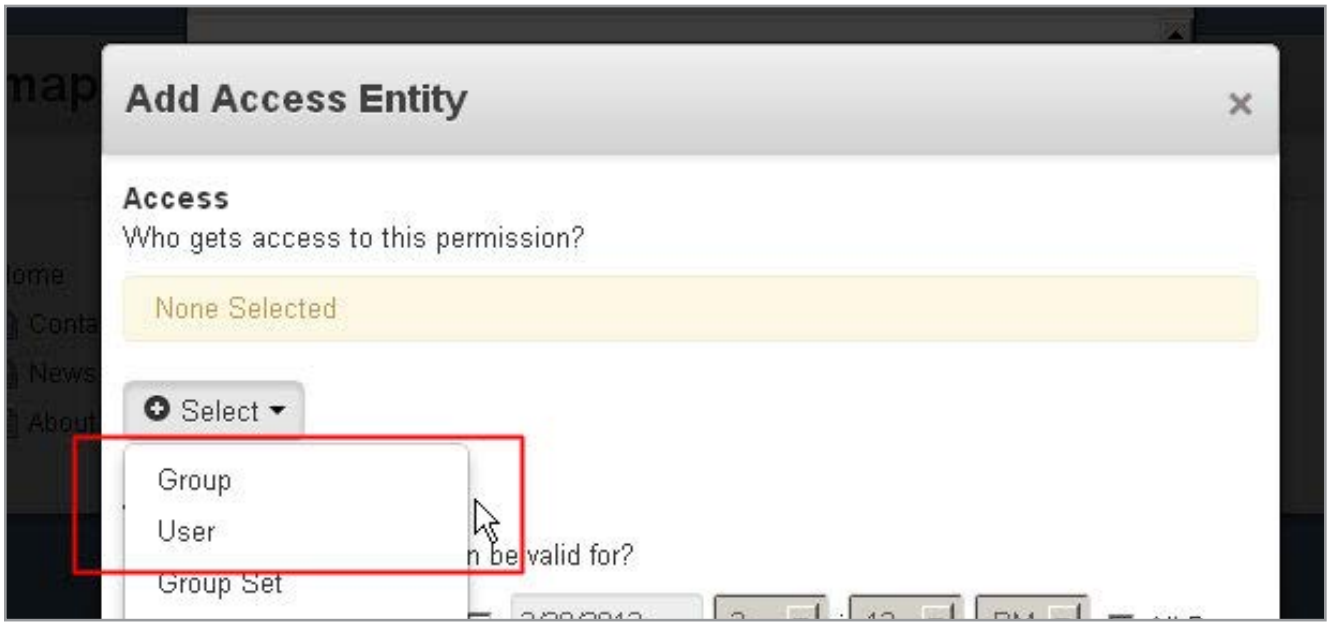
11. The **Access Entity Dropdown** will appear:



- If you want to give a group access, **Group**.

- If you want to give an individual user access, click **User**.

12. Depending upon your choice in Step 11, either the **Add Group** or **Add User** window will appear. Click the name of the user or group you wish to adjust.

13. The **Add Group** or **Add User** window will disappear. The name of the user or group you clicked will now appear in blue at the top of the **Add Access Entity** screen.

14. Click the blue **Save** button in the lower right of the **Add Access Entity** window.

15. You will be returned to the **Edit** window. Click the blue **Save** button in the lower right of the **Edit Contents** window.

16. You will be returned to the **Set Permissions** window.

17. Click the blue **Save** button in the lower right hand corner of the **Set Permissions** window.

18. It is extremely important to test the new permissions you have configured to be certain the correct users are now able to access the page or section you have adjusted. Click the **Dashboard** button to visit the **Full Dashboard**.

19. Locate the **Members** section of the **Dashboard**. Click the **Search Users** link that appears at the top of the **Members** section.

20. The **Search Users** screen will appear.

- If you adjusted the permissions for a group, locate a user that belongs to that group

- If you adjusted the permissions for a specific user, locate that user.

continued....

21. Click the entry in the username column for that the user. The **View User** screen will appear.
22. Click the **Sign In As User** button that appears at the top of the **View User** screen.
23. You have now signed into the website as this user. Navigate through the website and confirm that the user can access the pages of the site you intend them to be able to visit.

Start and Stop Permissions on Specific Dates & Times

The PDS eCMSpro permissions system enables you to configure specific dates and times at which specific privileges should begin and end. This can be used to configure individual pages so that they become publicly available on a specific day at a specific time.

Follow the steps below to configure a page to become accessible to the public at a predetermined time in the future.

1. Click the **Dashboard** button on the **Toolbar** to visit the full **Dashboard** page.
2. Locate the **Sitemap** section of the **Dashboard**. Click the **Full Sitemap** link that appears at the top of the **Sitemap** section.
3. Locate the name of the page you wish to give edit access to and click it with your left mouse button to display the **Context Menu**.
4. Locate the **Set Permissions** item in the **Context Menu**. Click the **Set Permissions** item with your left mouse button.
5. The **Set Permissions** screen will appear. The first option on the **Set Permissions** screen is titled **Assign Permissions**. If the **Assign Permissions** option reads “By Area of Site” or “From Page Type Defaults” change the **Assign Permissions** option to “Manually”.

6. If the **Assign Permissions** option read “By Area of Site” or “From Page Type” defaults and you changed it to “Manually” the **Confirm Change** window will appear. Click the red OK button in the lower right of the **Confirm Change** window to save the change and continue.
7. With **Assign Permissions** set to “Manually” you can now begin adjusting permissions for this page.
8. Click the blue **View** link.

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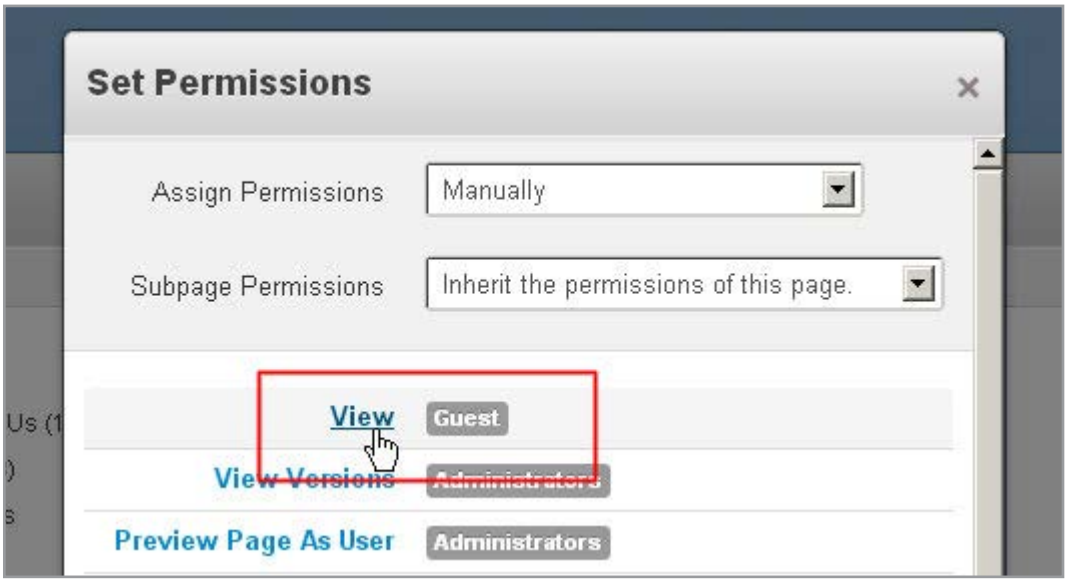

9. The **View** window will appear. Locate the **Included** section at the top of the **View** window.
10. Locate the **Guest** item that is listed in the **Included** section. This represents the **Guest** group. All public visitors that have not logged in to your website belong to the **Guest** group.
11. Click the **clock** icon to the right of the **Guest** item. The **Add Access Entity** window will appear.

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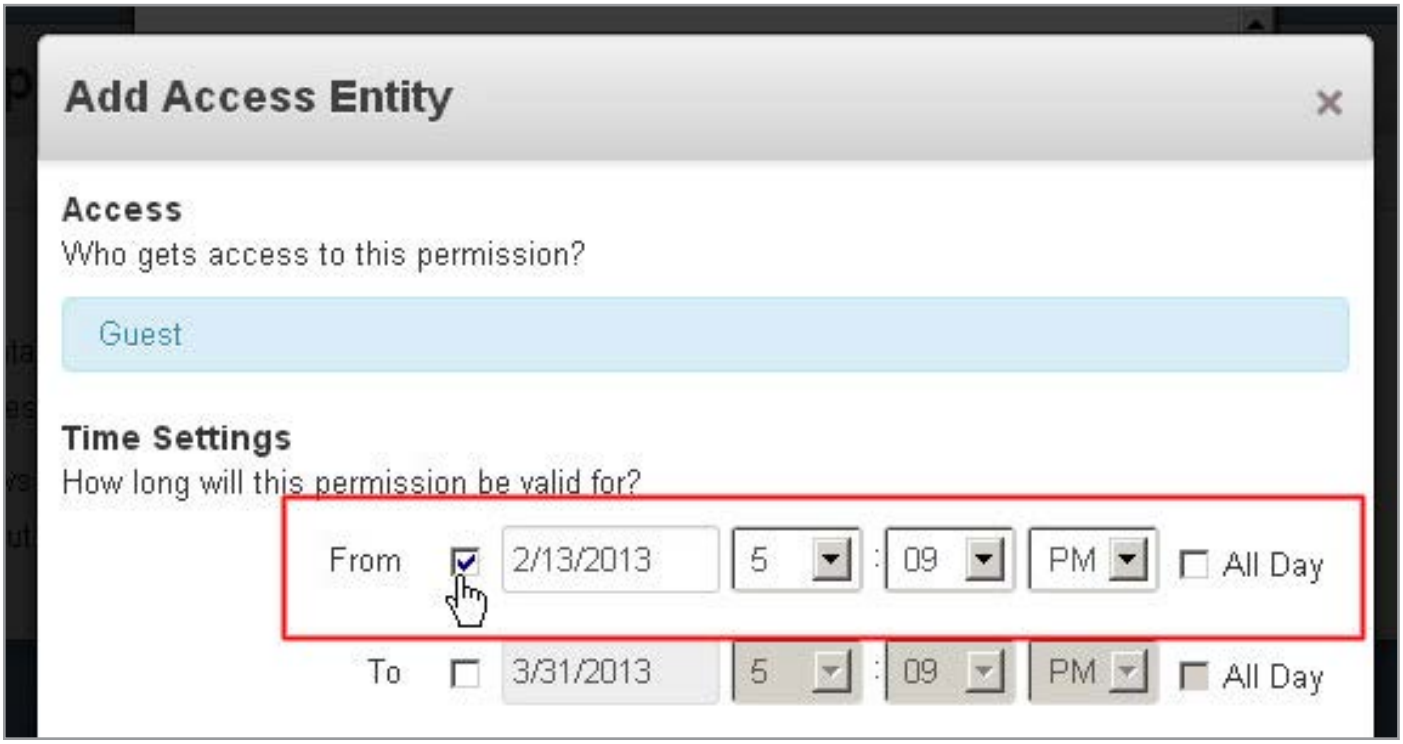
12. Locate the **Time Settings** section of the **Add Access Entity** window. Check the **From** check-box and use the controls to specify the date and time at which you would like the page to become publicly accessible.



13. Click the blue **Save** button in the lower right hand corner of the **View** window. This saves the adjustment. You will be returned to the **Set Permissions** window.
14. Save the adjustment by clicking the blue **Save** button in the lower right hand corner of the **Set Permissions** window.
15. It is extremely important to test the new permissions you have configured to be certain that the page of the site you adjusted is not yet publicly accessible. Click the **Sign Out** button in the upper right hand corner of your web browser to log out and view the site as a public user.
16. Navigate through your site and confirm that the page you adjusted is not yet accessible for public visitors.

Types of Permissions

The **Set Permissions** screen allows you to grant and revoke a variety of privileges. This section details common privileges you may want to assign to or remove from users and groups on your site.

View
Allows a user or group to visit a page or section.

View Versions
Allows a user or group to view all stored versions for a page or section.

Preview Page As User
Allows a user or group access to the **Preview Page As User** tool.

Edit Properties
Allows a user or group to change the title, custom attributes, description, path and other aspects of a page or section.

Edit Contents
Allows a user or group to edit the blocks contained on a particular page or in all the pages of a particular section.

Edit Permissions
Allows a user group to grant and revoke permissions via for a particular page or section.

Delete
Allows a user or group to delete a particular page or section of pages.

Delete Versions
Allows a user or group to delete stored versions for a particular page or section of pages.

Approve Changes
Allows a user or group to approve preview versions for a particular page or section of pages.

Add Sub Page
Allows a user or group to create new pages beneath a particular page or section.

Move or Copy Page
Allows a user or group to change the location of a specific page or section of pages within the **Sitemap**. Also allows a user or group to duplicate a specific page or section of pages.

Schedule Guest Access
Allows a user or group to adjust when the public Guest group can and cannot visit a particular page or section of pages.